The Florida Senate

COMMITTEE MEETING EXPANDED AGENDA

AGRICULTURE
Senator Albritton, Chair
Senator Gainer, Vice Chair

MEETING DATE: Monday, February 4, 2019
TIME: 1:30—3:30 p.m.
PLACE: 301 Senate Building

MEMBERS: Senator Albritton, Chair; Senator Gainer, Vice Chair; Senators Broxson, Montford, and Rader

TAB	BILL NO. and INTRODUCER	BILL DESCRIPTION and SENATE COMMITTEE ACTIONS	COMMITTEE ACTION
1		Overview and Discussion of the Impact of Agriculture in Florida	Presented
2		Update on Hurricane Michael Recovery by UF/IFAS	Presented
3		Presentation on Agricultural Best Management Practices by Rich Budell, Budell Water Group	Presented
4		Update on the Florida Department of Citrus by Shannon Shepp, Executive Director	Presented
		Other Related Meeting Documents	

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Florida Senate Agriculture Committee

February 4, 2019

Rodney L. Clouser

Professor and Associate Chair, Food and Resource Economics Department

University of Florida-IFAS

Food and Resource Economics

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Structure of comments today:

1. The importance of Florida agriculture, natural resources and food industries to the state.
2. Composition/make-up of agriculture and natural resources industry in Florida and data related to some commodities, and their importance nationally or internationally.
3. Will conclude with a few “big issues and challenges” in the industry and for policy makers looking toward the future.

(Most data presented today are reported by the National Agricultural Statistics Service (NASS) in 2017 (2016 and in some instances 2015 data)

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Contributions to the State Economy

Local, state and federal policy makers, industry and individual producers get excited when the impacts of Florida agriculture, natural resources and food industries are reported annually.

The latest report indicates:

1.68 million direct jobs

611,000 indirect and induced jobs or

2.294 million total jobs in Florida

$165.5 billion in output/sales contributions

$47.7 billion in foreign and domestic exports

contributions to the state economy

$137.7 billion in total value added contributions to the state (14.7% of Gross State Product)

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Contributions to the State Economy

Sceptics might argue "narrow that down to production related agriculture." So remove food and kindred products distribution and nature based recreation.

Guess what? The contributions are still large:
634,400 plus total jobs in Florida and
$42.3 billion in total value added contributions to the state (or about 4.5 % of Gross State Product)

And, the pertinent question to ask is "How would or could the state fill that gap in Florida's economy if Florida's agriculture was less robust?"

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Maybe even more impressive about the state's agriculture and natural resource industries are:

4. Florida is literally the A-Z (alligators to zucchini, or maybe you prefer, asparagus to zinnias) of commodity production in the US and a world leader as well.

-Estimate about 200 different commodities produced in the state

-Some form of agriculture is present in every county in the state

3. Florida agriculture has been long-term resilient and innovative in spite of droughts, floods, fires, multiple freezes, hurricanes, labor issues, trade issues, strong and weak national/international economies, pests and diseases.

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Maybe even more impressive about the state's agriculture and natural resource industries are:

2. **Florida is the breadbasket of winter production in the US of healthy, nutritious and affordable vegetables/fruits. Important to food supply both nationally and internationally!**

1. **Most impressive in my opinion, in spite of all the challenges, is a state growth rate that has expanded from less than 10 million in the early 1980s to a state population in 2018 of 21.3 million and the agriculture and natural resource sectors are the main owners, users and stewards of over 73% of the state's land base.**

This needs to be continually stressed to residents and policy makers!

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Data Supports the Importance of the Industry

Industry Makeup and Composition

Most Florida residents are surprised that the state of Florida consist of about 36 million acres. Most of it is agricultural and natural resource related use:

Total Land Area in Florida:	**36 million acres**
Forested Land Area:	**17 million acres**
Private ownership:	**10.5 million acres**
Public ownership:	**5.6 million acres**
Land in Farms:	**9.5 million acres**

Approximately 26.5 million acres of the state's 36 million acres are used for agriculture and natural resource use. That equates to 73.6 percent of the land area in Florida.

Data Supports the Importance of the Industry

Industry Makeup and Composition:

Most of this land is privately owned by, families, family businesses and corporations or cooperatives.

Farms identified in Florida the last Census of Agriculture -approximately 47,000.

The average size farm in the state is 200 acres.
Less than half the size of the U.S. average of 442 acres.

Comparisons: Texas has an average farm size of 537 acres, California of 331 acres and Illinois 351 acres.

In Florida only about 5,600 farms, or about 12% of farms identified have sales greater than $100,000.

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Data Supports the Importance of the Industry

Industry Makeup and Composition:

- **Florida farms with sales between $10,000 and $99,999 represents the state's fastest growth segment over the last 12-13 years with 33% growth.**
- **Based on NASS reports 2016 (2015 data) Florida ranked 17th in farm cash receipts ($8.37 billion sales) in the U.S.**
- **California ranked first ($47 billion) with the "American Bread Basket states" (Iowa, Nebraska, Minnesota, Illinois, Kansas, Wisconsin and Indiana) all ranked in the top 10 with receipts between $11 and $27.6 billion.**
- **Because of Hurricane Irma's impact in 2017 and continuing problems with citrus greening my expectation is that Florida's ranking will decline some in terms of cash receipts.**

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Data Supports the Importance of the Industry

Industry Makeup and Composition: **Net Farm Income Provides a Better Understanding:**

Florida net farm income, or receipts less expenses, ranked 7th nationally at just over $3 billion. California leads all states in the U.S. in this category with $14.6 billion in net farm income.

In many ways, that explains Florida's agriculture industry; a "high risk but high reward (high valued specialty crops)" industry when conditions go well (e.g., weather and markets).

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Florida Agriculture: National and International Importance

Florida's agriculture industry is diverse and dispersed throughout the state (literally every county).

Vegetables: produced throughout the state and winter vegetables primarily south; Citrus: primarily central and southern areas; Cattle/Calves: throughout state; Row crops and Timber: northern tier of state and Floriculture: throughout state.

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Florida Agriculture: National and International Importance

Florida Value of Production as % of Total US Value (2016)

- 54% of the total U.S. value for grapefruit,
- 53% of the total U.S. value for oranges,
- 40% of the total U.S. value for fresh market tomatoes
- 37% of the total U.S. value for fresh market snap beans,
- 36% of the total U.S. value for fresh market cucumbers,
- 31% of the total U.S. value of cucumbers for processing,
- 29% of the total U.S. value for fresh market bell peppers,
- 24% of the total U.S. value for fresh sweet corn,
- 21% of the total U.S. value for watermelons,
- 19% of the total U.S. value for strawberries,
- 24% of the total U.S. value for fresh sweet corn.

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Florida Agriculture: National and International Importance

Florida Value of Production as % of Total US Value (NASS 2016)

14 Commodity Sectors with Sales Greater Than $100 Million

Commodity	Florida	U.S.	Florida percent of U.S.	Florida national ranking
	(1,000 dollars)	(1,000 dollars)	(percent)	
Oranges	1,173,488	1,963,353	59.8	1
Floriculture	1,039,411	4,373,639	23.8	2
Cattle/Calves	859,164	78,228,639	1.1	21
Sugarcane for Sugar and Seed	561,099	1,016,944	55.2	1
Dairy Products	548,688	35,739,249	1.5	16
Tomatoes, Fresh	453,102	1,243,113	36.4	1
Chicken Eggs	315,615	13,499,904	2.3	15
Strawberries	290,598	2,219,144	13.1	2
Peppers, Bell	220,478	806,115	27.4	2
Broilers	203,149	28,709,834	0.7	19
Sweet Corn, Fresh	154,980	927,413	16.7	2
Grapefruit	127,313	216,258	58.9	1
Peanuts	120,215	1,275,227	9.4	3
Potatoes	103,366	3,594,450	2.9	12

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Florida Agricultural Exports 2017

***Florida Products Exported*:**	
Meats (fresh/frozen)	$599 million
Prepared vegetables/fruits	$360 million
Dairy Products	$346 million
Edible fruits/nuts	$329 million
Edible vegetables	$291 million
Other miscellaneous	$454 million
Importing Countries:	
Canada	$747 million
Mexico	$250 million
Dominican Republic	$216 million
Bahamas	$210 million
Panama	$165 million
Netherlands	$143 million
Columbia	$139 million
Trinidad & Tobago	$120 million
Guatemala	$111 million
Costa Rica	$103 million

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Significant Future Policy Issues of Florida's Agricultural and Natural Resources

Challenging policy issues in Florida's future related to agriculture, natural resource and the environment are numerous. Policy choices will be difficult and demanding! There will be no shortage of issues and policy choices.

R. Clouser

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Top Tier Tough Florida Agricultural Policy Issues

4. *Recovery from back-to-back hurricanes with large impacts on Florida's agriculture and natural resources.

3. *Farm labor Issues have been well documented in Florida. For Florida agriculture to thrive in the future, a ready, reliable and skilled based labor supply is required.

2. *Pest and disease problem in farm production and specifically citrus greening.

1. *Water quality issues related to agricultural production and the state's natural resources.

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Big Issues Will Be Abundant – Policy Decisions Tough!

Policy Choices For the Future Need to be Thought of As An Investment Rather Than a Fiscal Expense!

Why?

Agriculture is a Primary Owner, User and Steward of the State's Land and Natural Resource Base.

Florida agriculture has been long-term resilient and innovative in spite of many challenges!

Back to Where We Started: The Pertinent Question to Ask is "How would or could the state fill that gap in Florida's economy if Florida's agriculture was less robust?"

THE FLORIDA SENATE

APPEARANCE RECORD

(Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)

2/4/2019
Meeting Date

Bill Number (if applicable)

Topic Impacts of Agriculture in Florida

Amendment Barcode (if applicable)

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Speaking: ☐ For ☐ Against ☑ Information

Waive Speaking: ☐ In Support ☐ Against
(The Chair will read this information into the record.)

Representing University of Florida Institute of Food and Agricultural Sciences (UF/IFAS)

Appearing at request of Chair: ☑ Yes ☐ No

Lobbyist registered with Legislature: ☐ Yes ☑ No

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S-001 (10/14/14)

Efforts Of UF/IFAS In Assisting North Florida Ag Producers In Recovering From Hurricane Michael

Glen Aiken, PhD

IFAS North Florida Research And Education Center

Quincy, Marianna And Suwannee Valley Units

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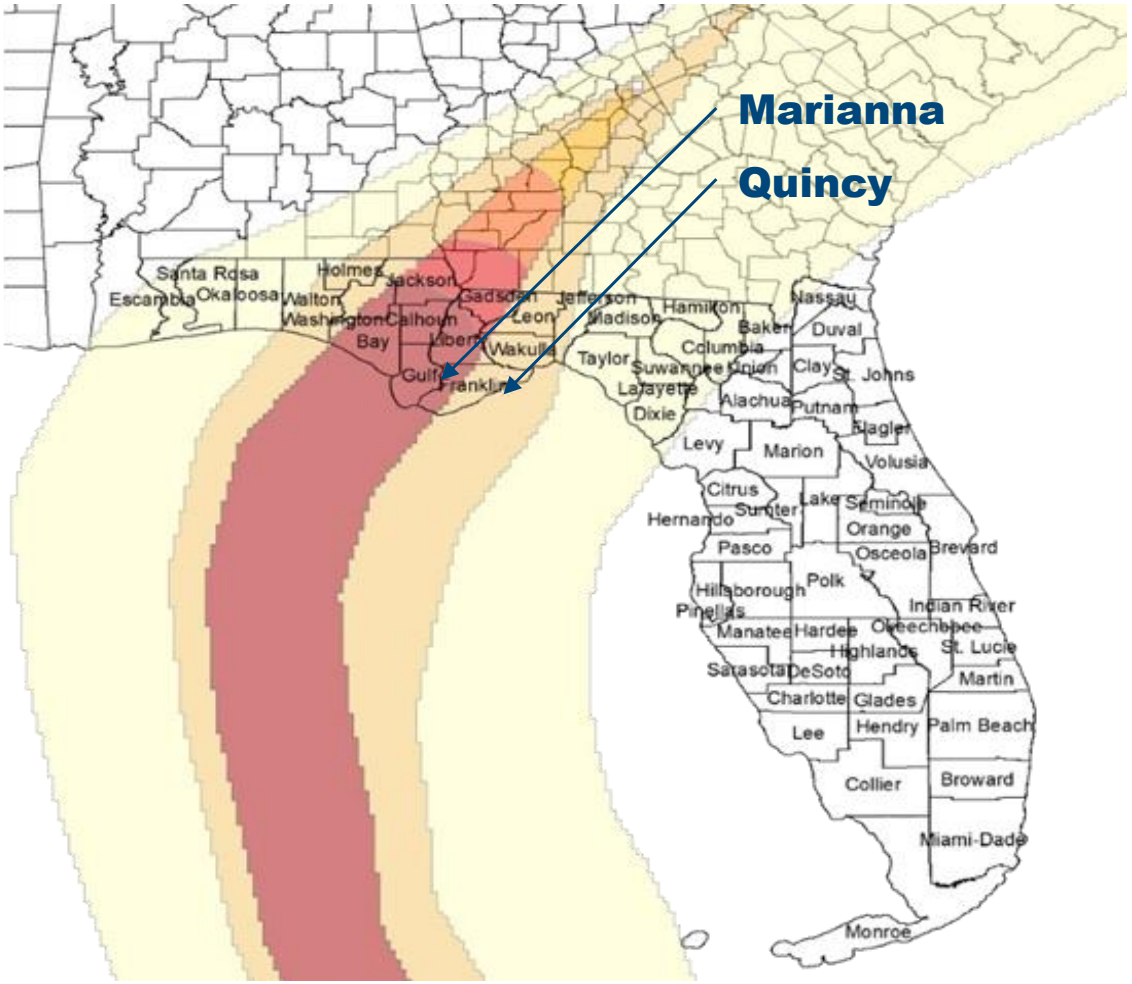
Wind speeds

- Tropical Storm: 39 – 57 mph
- Tropical Storm: 57 – 73 mph
- Cat. 1: 74 – 95 mph
- Cat. 2: 96 – 110 mph
- Cat. 3: 111 – 129 mph
- Cat. 4: 130 – 156 mph



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IFAS Faculty are Farmers too

- ✓ Clean-up,
- ✓ repairs,
- ✓ replacement of pivot irrigation systems

Replacement of greenhouses, feed barn, and peanut areas will be approximately $1.5 million for Quincy and Marianna Research Stations combined.

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Agricultural Assessments

- Post-storm agricultural damage assessments critical function of UF/IFAS Extension agents.
- USDA/FSA – wants to know what's happening in storm impacted area.
- FDACS needs information to apply for state and federal funding for restoration.
- UF/IFAS administration to determine area needs.
- Policy/Decision makers, (state & federal) need info to organize a response.

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Damage to Panhandle Agriculture

Losses in timber greater than $1.28 billion

Tomato fields in Quincy

Most cotton harvests were lost

Most pivots in Jackson County look like this

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Cattle Industry Suffered Significant Loss Of Livestock

- Cattle were lost through death,
- Most perimeter fences were down, cattle escaped,
- It took weeks to round up and return the survivors,
- Major challenge getting enough generators and hooking them up to water wells to provide water to cattle.

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How Can IFAS Further Assist Recovery Efforts And Prepare For The Next Hurricane?

- **Extension programs that address management strategies to mitigate hurricane damage**
- **Accelerate our development of alternative crops**
- **Additional research**

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Hurricane Recovery Workshop:

Taking the Next Steps to Salvage and Restoration of Forests and Natural Resources Impacted by Hurricane Michael

Calhoun County, FL

Date: **February 12, 2019, sign in at 9:00 am CST**
Lunch provided, concludes at 5:00 pm CST

Rivertown Community Church
19359 Highway 71
Blountstown, Florida 32424

October 2018 lingers on for many in west Florida. Hurricane Michael exploded onto shore in the central Florida Panhandle and barreled its way north, leaving behind an 80-mile wide path of destruction. Approximately three million acres of forestland was hit, with economic damages conservatively estimated to be $1.3 billion.

You are not alone. Many, if not most, forest landowners in this region are still looking for answers to difficult questions. What assistance is available? What do I do with trees still on the ground? Can I get reimbursed for losses? Can I get assistance with replanting? What are the tax implications? What is the status of forest product markets? Join us in Blountstown at this free hurricane recovery workshop for forest landowners, provided by the Florida Tree Farm Program. A panel of experts from a wide array of expertise will lead the discussion and help answer your questions. The Florida Forest Service, University of Florida IFAS Extension, Florida Tree Farm Program, Florida Forestry Association, Florida Farm Bureau, Florida Fish and Wildlife Conservation Commission, USDA Natural Resources Conservation Service and Farm Service Agency, forest and natural resource professionals, forest products industry, tax professionals, and fellow Tree Farmers and forest landowners will be there.

Register: This event is free and includes lunch. Register in advance so we can plan accordingly. **Contact UF/IFAS Calhoun Extension (850) 674-8323** to register. Please share this announcement with others who need this information.

Support for this event is provided by the Florida Tree Farm Program, USDA Forest Service via the Florida Department of Agriculture and Consumer Service's Florida Forest Service, and the Florida Sustainable Forestry Initiative Implementation Committee.

Workshops

- IFAS will develop extension workshops across commodity groups to address questions on management strategies to mitigate the effects of hurricanes.
- The first one is scheduled for **February 12, 2019.**
- There will be opportunities for on-farm research or demonstrations; particularly with timber growers.

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The Northwest Extension District had two trailers for delivering supplies, materials and generators to those in need.

These were critical tools but we just didn't have enough to meet the needs.

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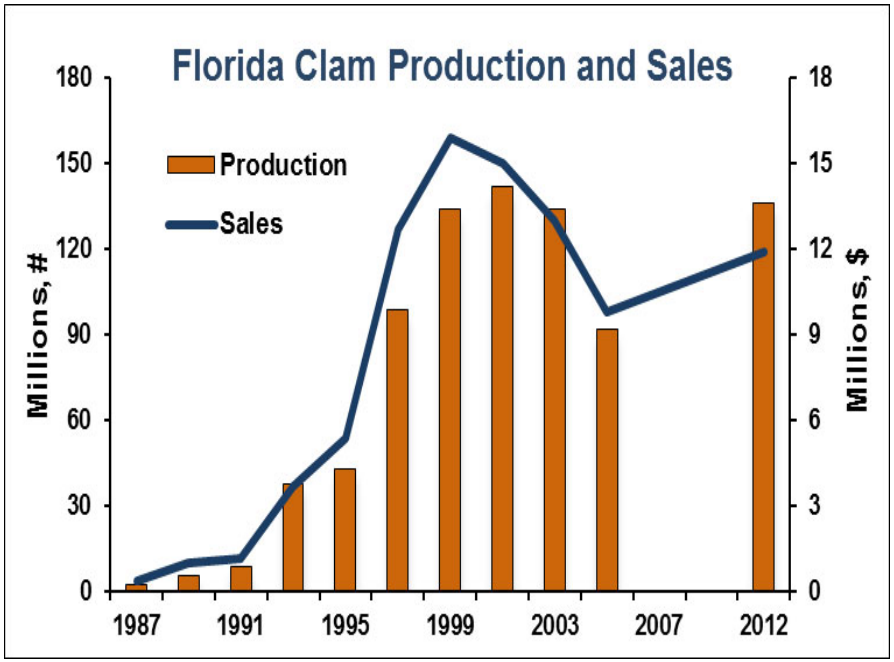
Florida Clam Industry
We Have A History Of Success

- The most recent study of the economic contribution of the Florida clam industry was conducted in 2012. Industry output, or gross revenue impact to the state's economy, was estimated to be $38.7 million.
- Value of sales by growers to wholesale dealers was $12.3 million, while value of sales by dealers was $19.5 million.



- As hard clams made their way from the production site to the final buyer, **$21.9 million** in added value was generated.
- The clam culture industry supported **543 jobs** and generated **$14.7 million** in labor income.
- Hard clam sales generated **$1.4 million** in state/local tax revenues and **$2.7 million** in federal taxes

Alternative Crops: There is a growing need, especially after Hurricane Michael!

Industrial Hemp

This alternative crop is growing in popularity and has the interest of the ag industry and it has a number of alternative uses:

- Extraction of cannabidiol (CBD) from floral material for health and wellness products
- High-quality fiber
- Grain for food
- Seed for planting hemp

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There Is An Opportunity In North Florida To Expand Acreage Of Satsuma And Other More Cold-tolerant Orange Varieties.

- **Less pressure from psyllids and Greening (HLB) Disease.**

- **Considerable interest in citrus among growers as an alternative crop for diversification.**

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Alternative Crops: Carinata

- Oil from the seed is converted to aviation fuel
- High protein source for animal feed
- Drought and heat tolerant
- High yield
- Carinata releases potent bio fumigants that could control soil borne diseases, insects, and weeds
- USDA-NIFA funded grant to Dr. David Wright (NFREC) to evaluate as a bio-energy crop

Alternative Crop: Lupines

- Oil from seed is converted to bio-diesel and meal is high protein.
- Excellent cover crop
- Research done at Quincy REC during the 1930s and 1940s

Hops

- UF/IFAS began testing hops in Central Florida in late 2015
- There is a growing market.
- The number of craft breweries in Florida has jumped from 66 in 2013 to 243 in 2017 with an economic impact of over $3 billion.

Additional uses:

- Anti-microbials in hops have shown to have benefits in the diet of ruminants.
- Used to make paper.

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Needs of IFAS for Future Recovery Efforts and Preparation for Hurricanes to Come

- Additional trailers for delivering materials and supplies to agricultural producers. This will also help meet educational needs.
- Coordinate workshops, round-table discussions and on-farm trials to develop strategies for recovery of farming operations and reducing risks for future hurricanes.
- Conduct research to identify genotypes and develop BMPs for developing a strong citrus industry in North Florida.
- Expand our research efforts with industrial hemp and other alternative crops to develop BMPs, assess economics and provide options to growers.
- Develop plans to effectively mitigate problems associated with salt water surges, wind damage to structures and fences, and long-term power (accessible generators).

Questions?

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THE FLORIDA SENATE

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2/4/2019
Meeting Date

Bill Number (if applicable)

Amendment Barcode (if applicable)

Topic Efforts of UF/IFAS assisting Hurricane Michael Recovery

Name Dr. Glen Aiken

Job Title Center Director. North Florida Research and Education Center

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City *State* *Zip*

Email

Speaking: ☐ For ☐ Against ☑ Information

Waive Speaking: ☐ In Support ☐ Against
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S-001 (10/14/14)

Agricultural Best Management Practices Implementation and Performance

Senate Committee on Agriculture
Senator Ben Albritton, Chair
February 4, 2019

Rich Budell

Budell Water Group

BMP Background

Agricultural Production Diversity

-More than 300 commodities-

-Seasonal vs. Year round-

-Soils, topography-

-Weather-

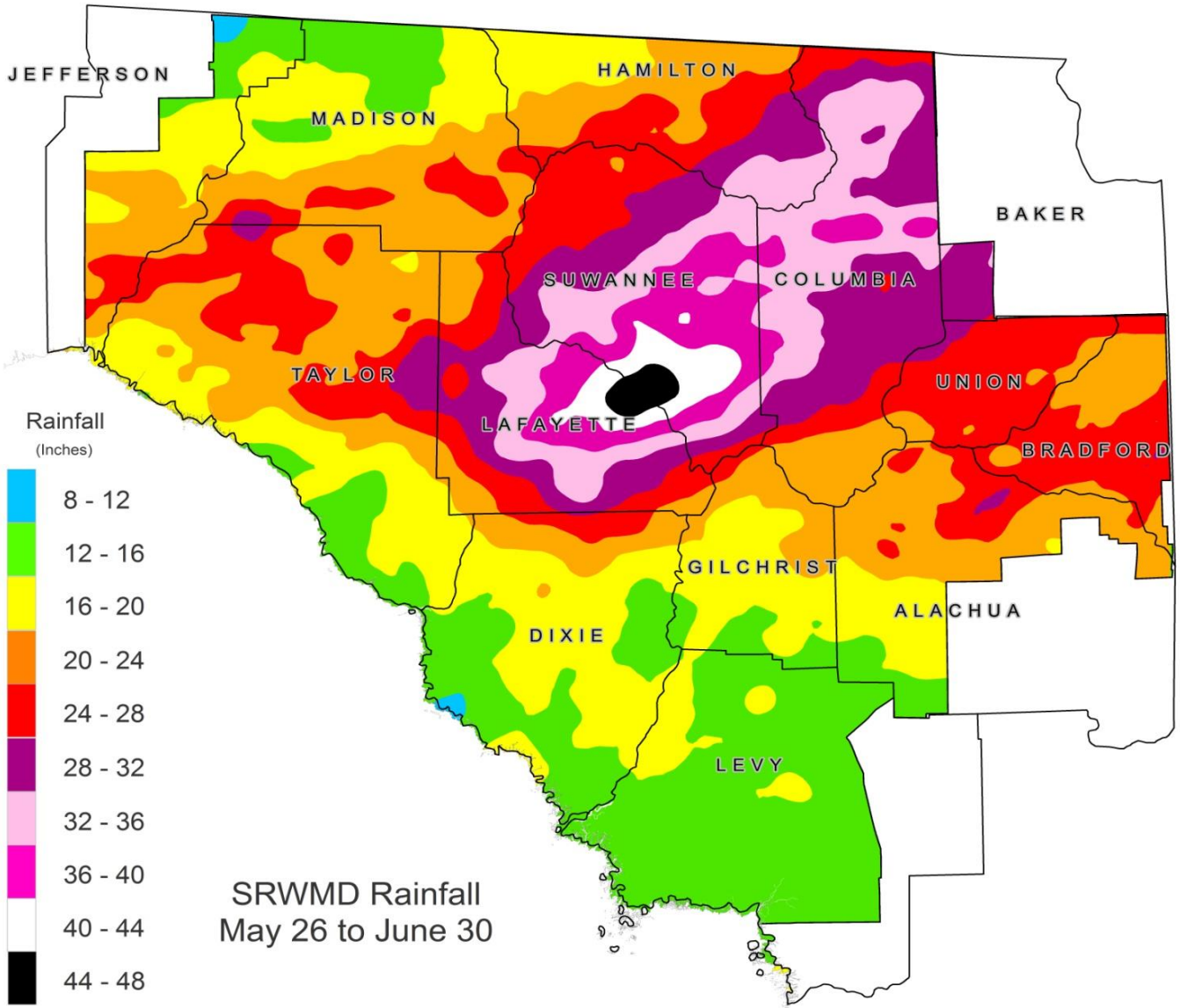
-Unique environmental features-

Comprehensive Water Resource Programs

-Numeric Nutrient Criteria

-Total Maximum Daily Loads

-Basin Management Action Plans


JEFFERSON
MADISON
HAMILTON
BAKER
SUWANNEE
COLUMBIA
TAYLOR
LAFAYETTE
UNION
BRADFORD
GILCHRIST
ALACHUA
DIXIE
LEVY
Rainfall
(Inches)
8 - 12
12 - 16
16 - 20
20 - 24
24 - 28
28 - 32
32 - 36
36 - 40
40 - 44
44 - 48
SRWMD Rainfall
May 26 to June 30

BMP Verification

Initial BMP Verification

-Conducted by FDEP for all BMP Manuals-
-Based on published and technical data-
-Manual revisions also reviewed-
-Precursor to Manual adoption-

BMP Implementation

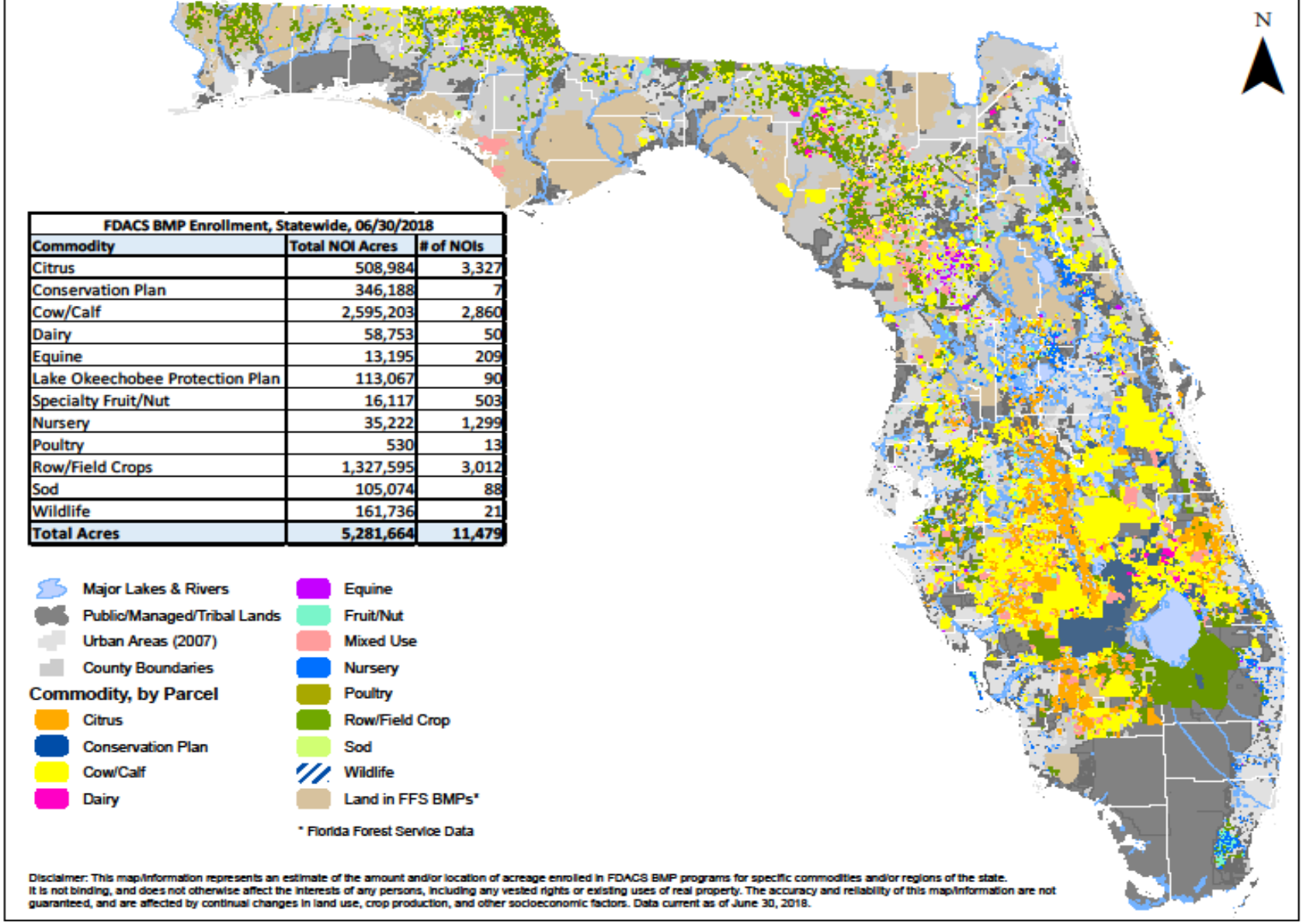
BMP Enrollment Data

-BMP selection & enrollment conducted by FDACS staff-

-BMP implementation status conducted by surveys and site visits-

-Within BMAP areas & for all of Northern Everglades, landowners must either implement BMPs or conduct water quality monitoring-

-Irrigated vs non-irrigated acreage-



FDACS BMP Enrollment, Statewide, 06/30/2018		
Commodity	**Total NOI Acres**	**# of NOIs**
Citrus	508,984	3,327
Conservation Plan	346,188	7
Cow/Calf	2,595,203	2,860
Dairy	58,753	50
Equine	13,195	209
Lake Okeechobee Protection Plan	113,067	90
Specialty Fruit/Nut	16,117	503
Nursery	35,222	1,299
Poultry	530	13
Row/Field Crops	1,327,595	3,012
Sod	105,074	88
Wildlife	161,736	21
Total Acres	**5,281,664**	**11,479**

Major Lakes & Rivers
Public/Managed/Tribal Lands
Urban Areas (2007)
County Boundaries

Commodity, by Parcel

Citrus
Conservation Plan
Cow/Calf
Dairy
Equine
Fruit/Nut
Mixed Use
Nursery
Poultry
Row/Field Crop
Sod
Wildlife
Land in FFS BMPs*

* Florida Forest Service Data

Disclaimer: This map/information represents an estimate of the amount and/or location of acreage enrolled in FDACS BMP programs for specific commodities and/or regions of the state. It is not binding, and does not otherwise affect the interests of any persons, including any vested rights or existing uses of real property. The accuracy and reliability of this map/information are not guaranteed, and are affected by continual changes in land use, crop production, and other socioeconomic factors. Data current as of June 30, 2018.

BMP Performance

Confirmatory BMP Verification

-Completed by FDEP for:
Silviculture BMPs-
Ridge Citrus BMPs-

-Completed by SFWMD for EAA BMPs-

-Monitoring underway in other areas-

-BMP performance is variable-

Typical EAA landscape

Comprehensive Best Management Practices Plans

Dissolved P

Nutrient Management

Fertilizer spill prevention

Fertilizer in root zone

Restricted Placement of Feeders

Particulate P

Particulate Matter and Sediment Control

Systematic canal/ditch cleaning

Barrier upstream of structure

Forage Growth

Discharge Volume

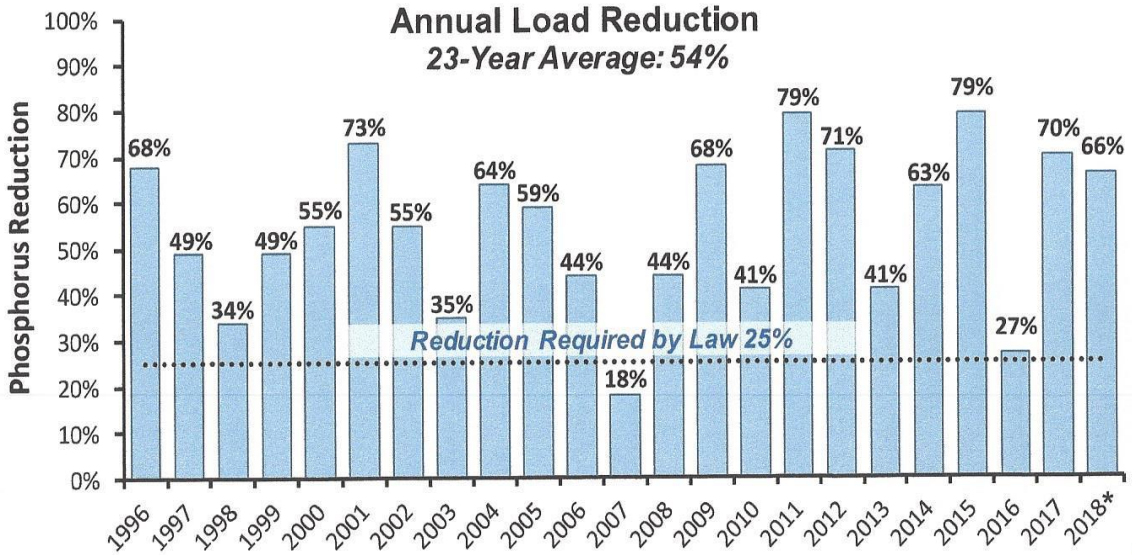
Water Management

Rain Gauge

Control structure

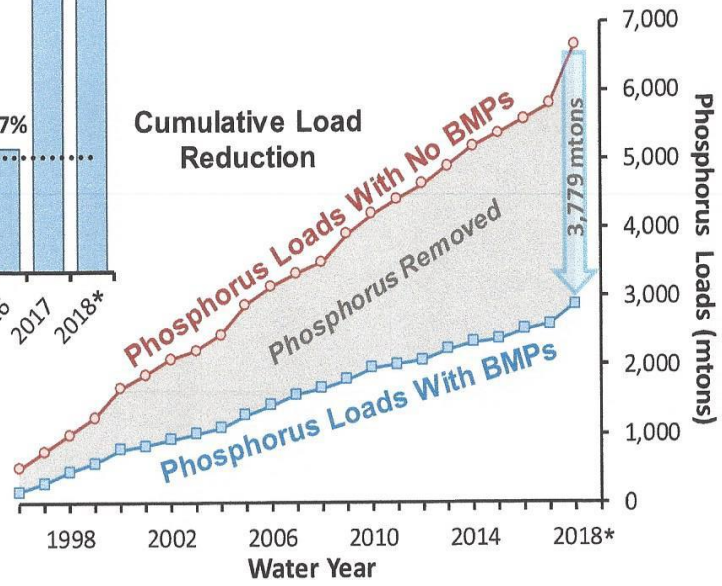
Staff Gauge

Everglades Agricultural Area
Phosphorus Load Reduction Achieved with BMPs



Best Management Practices prevented 3,779 metric tons of phosphorus from leaving the EAA

mtons – metric tons = 1,000 kilograms

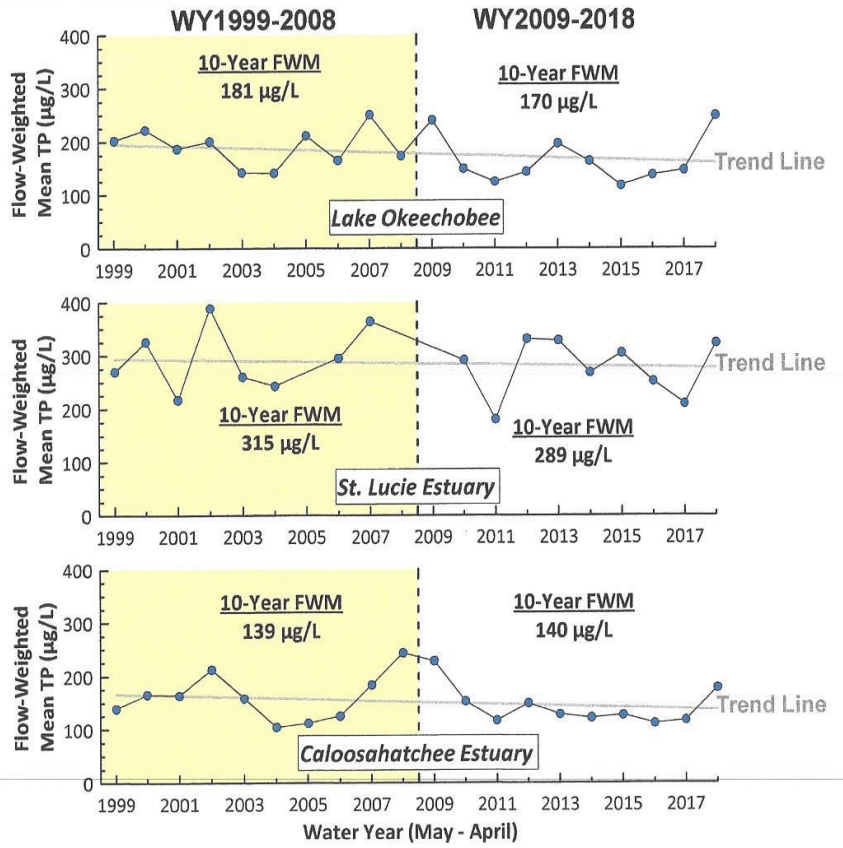


**WY2018 Extraordinarily Wet Year*

Typical Lake Okeechobee Watershed Landscape

Long-term Flow-weighted Mean Phosphorus Concentration Trends

Lake Okeechobee and St. Lucie Estuary and Calooshatchee Estuary



Lake Okeechobee Inflows

- FWM TP concentration for last 10 years is 6% lower than previous 10-year period
- General downward trend over 20-year period

St. Lucie Estuary Inflows*

- FWM TP concentration for last 10 years is 8% lower than previous 10-year period
- General downward trend over 20-year period

Caloosahatchee Estuary Inflows*

- No apparent difference in FWM TP concentrations between last 10 years and previous 10-year period
- Lower variability in concentrations last 10 years
- General downward trend over 20-year period

Excluding Tidal Portions of St. Lucie and Caloosahatchee Estuaries

Source Data: South Florida Environmental Reports

µg/L = ppb; FWM = Flow-Weighted Mean

Summary Facts

-BMP performance varies with weather, geography and production technique-

-We must commit to long-term BMP performance monitoring-

-Biological systems to not respond in time-frames that match our desires-

-Implementation of BMPs alone will not achieve our water resource protection and restoration goals-

Questions?

Rich@BudellWaterGroup.com

THE FLORIDA SENATE

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Topic Ag. BMPs

Amendment Barcode (if applicable)

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City *State* *Zip*

Phone 850 519 0115

Email

Speaking: ☐ For ☐ Against ☒ Information

Waive Speaking: ☐ In Support ☐ Against
(The Chair will read this information into the record.)

Representing

Appearing at request of Chair: ☒ Yes ☐ No

Lobbyist registered with Legislature: ☐ Yes ☒ No

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S-001 (10/14/14)

Florida Department of Citrus

presentation to the Florida Senate Committee on Agriculture

Shannon Shepp
Executive Director
February 4 , 2019

2016/17 ECONOMIC CONTRIBUTIONS REPORT

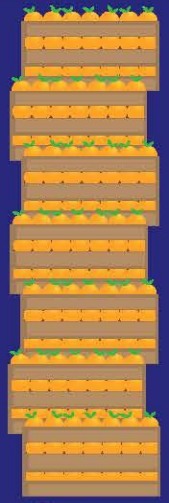
FLORIDA CITRUS

Contributing to Florida's economy since 1893

CITRUS PRODUCTION

Contributing
$7.2 billion
in industry output to Florida's economy

68.7 MILLION BOXES



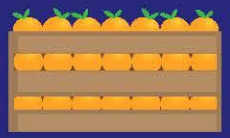
Oranges

1.9 MILLION BOXES

Specialty Fruit

7.8 MILLION BOXES

Grapefruit



PACKED CITRUS
12,588,860 cartons

=

ENOUGH TO COVER THE FOOTPRINT OF THE
EXECUTIVE TOWER
AND REACH 2.6X AS HIGH

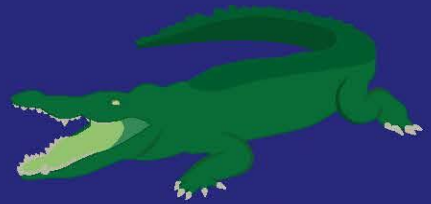
CITRUS JUICE
774 million gallons

=

ENOUGH TO GIVE EVERYONE IN THE
WORLD AN 8OZ CUP OF JUICE

CITRUS BYPRODUCT
322,803 tons

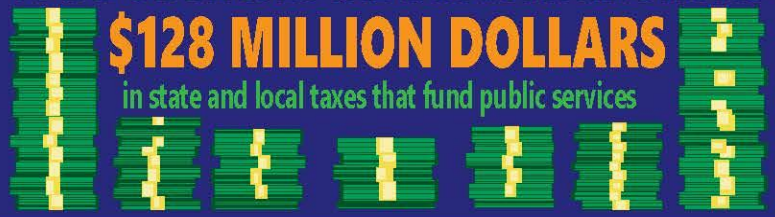
=



THE TOTAL WEIGHT OF ALL
ALLIGATORS IN FL

FLORIDA CITRUS PRODUCTION
EQUALS 1.5X THE TOTAL SPACE OF THE
VEHICLE ASSEMBLY BUILDING
AT NASA'S KENNEDY SPACE CENTER

TOTAL STATE & LOCAL TAX CONTRIBUTIONS



$128 MILLION DOLLARS
in state and local taxes that fund public services

DIRECT CONTRIBUTIONS

TOTAL INDUSTRY OUTPUT
$4.433 BILLION DOLLARS
citrus growers, processors, and packinghouses

EMPLOYMENT
27,713 JOBS
fulltime and part-time

LABOR INCOME
$978 MILLION DOLLARS
in income for Florida families

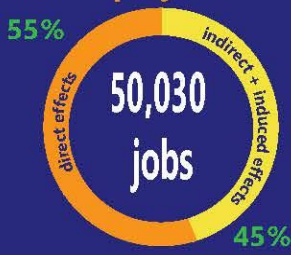
But it doesn't stop there.

Citrus activities also generate additional economic activity throughout Florida's economy, namely indirect and induced effects.

TOTAL CONTRIBUTIONS

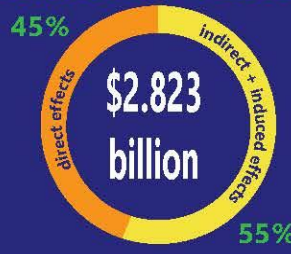
Industry Output

Employment



Labor Income

Gross State Product



UF IFAS UNIVERSITY of FLORIDA ECONOMIC IMPACT ANALYSIS PROGRAM
fred.ifas.ufl.edu/economicimpactanalysis

PRODUCED FOR FLORIDA CITRUS

Citation:
Court, Christa D., Hodges, A.W., Stair, C. "Economic Contributions of the Florida Citrus Industry in 2016-17." Economic Impact Analysis Program, University of Florida/IFAS, Food and Resource Economics, Gainesville, FL, December 2018.

Florida Department of Citrus

- Established in 1935 by growers
- Self-funded for 80+ years
- 9 member Florida Citrus Commission appointed by Governor

CONSUMER EDUCATION AND ENGAGEMENT PROGRAMS

FLORIDA OJ PROGRAMS DRIVE DEMAND & PROVIDE HIGH RETURN ON INVESTMENT

A focus on **POSITIVE ATTRIBUTES** of FLOJ **DRIVES** consumer demand and awareness of nutritional benefits

Perception of **NEGATIVE ATTRIBUTES** of FLOJ (sugar and calorie content) have **MINIMAL IMPACT** on consumer demand

Social Media and Digital Advertising have a direct impact on demand by influencing market penetration and quantity/volume

FDOC consumer education and engagement programs **ENHANCED DEMAND** by **12%**

For every $1 spent...

FDOC delivers a net return of **$9.75** to the State of Florida

1040+ jobs protected in Florida in the past year

CITATION:
Heng, Y., R.W. Ward, L.H. House, and M.L. Zansler "Assessing Key Factors Influencing Orange Juice Demand in the Current US Market" Presented to Florida Citrus Commission on September 19, 2018.

UF IFAS UNIVERSITY of FLORIDA FLORIDA AGRICULTURAL MARKET RESEARCH CENTER

PRODUCED FOR THERE'S AMAZING INSIDE FLORIDA CITRUS

Florida OJ 101: Sugar

Florida OJ 101: Hesperidin

Grower Profile: Ned Handcock

Steamed Orange Halibut

When it comes to Millennial Moms…

70% don't associate 100% OJ with sugar

50% Nutrient content overrides concerns about sugar

85% of moms feel good serving 100% OJ to family or friends

A quarter of Millennial Moms are still in the "persuadable" bucket.

27% are not sure if they associate 100% OJ and sugar

Opportunities for those who are not sure exist as we consider future programming.

Direct targeting works.
Nutrient content recall doubles with millennial moms.

MILLENNIAL MOMS ARE HOLDING STEADY ON POSITIVE ATTRIBUTES OF 100% OJ:

- Great source of vitamins and nutrients
- Made with only one ingredient: oranges
- Convenient

THE FLORIDA SENATE

APPEARANCE RECORD

(Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)

2/4/19
Meeting Date

Bill Number (if applicable)

Topic Florida Department of Citrus

Amendment Barcode (if applicable)

Name Shannon Shepp

Job Title Executive Director

Address 605 E. Main St.
Street

Phone 863 640 5492

Bartow FL 33830
City *State* *Zip*

Email SShepp@citrusmyflorida.com

Speaking: ☐ For ☐ Against ☐ Information

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S-001 (10/14/14)

CourtSmart Tag Report

Room: SB 301 **Case No.:** **Type:**
Caption: Senate Committee on Agriculture **Judge:**

Started: 2/4/2019 1:33:12 PM
Ends: 2/4/2019 3:29:54 PM Length: 01:56:43

1:33:11 PM Meeting called to order by Chair Albritton
1:33:20 PM Roll call by Administrative Assistant Laureen Zaugg
1:33:29 PM Quorum present
1:33:35 PM Pledge of Allegiance led by Sen. Broxson
1:34:09 PM Comments from Chair Albritton
1:34:40 PM Tab 4 introduced by Chair Albritton
1:34:54 PM Presentation by Ms. Shannon Shepp, Executive Director on the Florida Department of Citrus
1:49:40 PM Comments from Chair Albritton
1:50:09 PM Response from Ms. Shepp
1:50:24 PM Question from Senator Montford
1:50:33 PM Response from Ms. Shepp
1:52:21 PM Follow-up question from Senator Montford
1:52:37 PM Response from Ms. Shepp
1:52:54 PM Additional question from Senator Montford
1:53:00 PM Response from Ms. Shepp
1:53:25 PM Response from Chair Albritton
1:53:53 PM Response from Senator Montford
1:54:11 PM Response from Ms. Shepp
1:54:43 PM Additional comments from Senator Montford
1:54:56 PM Response from Ms. Shepp
1:55:52 PM Question from Senator Rader
1:56:09 PM Response from Ms. Shepp
1:58:56 PM Comments from Chair Albritton
1:59:04 PM Introduction of Tab 1 by Chair Albritton
1:59:24 PM Presentation by Dr. Clouser, University of Florida, Professor and Associate Chair, Institute of Food and Agricultural Services
2:14:42 PM Response from Chair Albritton
2:14:51 PM Continued presentation by Dr. Clouser
2:16:06 PM Comments from Chair Albritton
2:16:36 PM Response from Dr. Clouser
2:16:53 PM Additional comments from Chair Albritton
2:17:01 PM Question from Senator Broxson
2:17:21 PM Response from Dr. Clouser
2:18:40 PM Comments/question from Senator Rader
2:19:49 PM Response from Dr. Clouser
2:23:29 PM Follow-up question from Senator Rader
2:23:52 PM Response from Dr. Clouser
2:26:03 PM Comments from Chair Albritton
2:26:53 PM Introduction of Tab 2 by Chair Albritton
2:27:07 PM Presentation by Dr. Glen Aiken, Center Director, North Florida Research and Education Center, University of Florida
2:49:18 PM Comments from Chair Albritton
2:49:27 PM Question from Senator Montford
2:50:08 PM Response from Dr. Aiken
2:53:07 PM Follow-up question from Senator Montford
2:53:15 PM Response from Dr. Aiken
2:54:10 PM Additional question from Senator Montford
2:54:18 PM Response from Dr. Aiken
2:55:26 PM Comments from Senator Montford
2:55:33 PM Response from Dr. Aiken
2:56:17 PM Comments from Chair Albritton
2:56:23 PM Introduction of Tab 3 by Chair Albritton

2:56:49 PM Presentation by Mr. Rich Budell, President, Budell Water Group
3:03:02 PM Question from Senator Montford
3:03:09 PM Response from Mr. Budell
3:03:29 PM Continued presentation from Mr. Budell
3:16:53 PM Question from Chair Albritton
3:17:01 PM Response from Mr. Budell
3:18:34 PM Additional question from Chair Albritton
3:18:42 PM Response from Mr. Budell
3:18:56 PM Continued presentation from Mr. Budell
3:22:47 PM Question from Senator Montford
3:22:53 PM Response from Mr. Budell
3:25:49 PM Comments from Chair Albritton
3:26:00 PM Response from Mr. Budell
3:27:46 PM Question from Chair Albritton
3:27:53 PM Response from Mr. Budell
3:28:04 PM Question from Senator Gainer
3:28:14 PM Response from Mr. Budell
3:28:54 PM Comments from Chair Albritton
3:29:32 PM Senator Montford moves to adjourn, meeting adjourned without objection