The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.


This report looks at the following areas:

- Using packaging to boost sales
- Added-value drinks such as vegetable blends and cold-pressed juice to diversify the market

Companies producing different varieties of juices, be it cold-pressed, organic, with grains, seeds, and/ or with vegetables, could offer tasting events in order to grow awareness. As they can usually be more expensive or present more exotic flavors or combinations, customers can be put off of trying them and stick to what they are used to. Brands could team up with local bakeries, for instance, to hold such events. Free samples could also be tailored for replacing breakfast or to accompany lunch.
"Despite high sugar content, fruit juice has a positive image among Brazilians as 98\% agree that they are better for their health than CSDs (carbonated soft drinks). There is space for innovation and brands should use health credentials to boost sales."

- Andre Euphrasio, Research Analyst



## Fruit J uice - Brazil - J une 2016

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

## Overview

What you need to know
Products covered in this report
Excluded

## Executive Summary

The market
The recession is affecting the packaged juice market
Figure 1: Forecast of Brazil retail sales of juice, by value, 2011-21
Market drivers
The economy is going through a bad time
Key Players
Coca-Cola holds $42.9 \%$ of share by value
Figure 2: Value shares in the juice retail market, 2014 and 2015
The consumer
Freshly squeezed juice and powdered juice are the main types
Figure 3: Usage of fruit juice and juice drinks, Brazil, May 2016
Fruit juices are popular during lunch
Figure 4: Occasions for drinking fruit juice and juice drinks, Brazil, May 2016
100\% fruit juice, reduced-sugar, and organic beverages are the most likely to benefit among new products
Figure 5: Interest in new juice products, Brazil, May 2016
What we think

## I ssues and Insights

Using packaging to boost sales
The facts
The implications
Figure 6: New Maguary packaging, Brazil, May 2016
Added-value drinks such as vegetable blends and cold-pressed juice to diversify the market
The facts
The implications

## The Market - What you need to know

The juice category is suffering worldwide
The outlook for the Brazilian market is also not positive
Changes in lifestyle and an aging population

## Market Size and Forecast

Worldwide juice market
Domestic juice market performance

BUY THIS

## Fruit J uice - Brazil - J une 2016

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 7: Retail sales of juice in Brazil, by value, in R\$ billion, 2011-15
Figure 8: Retail sales of juice in Brazil, by volume, in million liters, 2011-15
Figure 9: Retail market volume consumption per capita (liter) of bottled water, carbonated soft drinks, and juice, Brazil, 2010-15
Brazil presents low consumption per capita
Figure 10: Worldwide consumption per capita of juice, selected countries

## Segment performance

Figure 11: Retail value sales of juice, in R\$ billion, 2014-15
Figure 12: Retail volume sales of juice, in million liters, 2014-15
Forecast for the juice market
Figure 13: Forecast of Brazil retail sales of juice, by value, 2011-21
Figure 14: Forecast of Brazil retail sales of juice, by volume, 2011-21

## Market Drivers

The Brazilian population is slowly aging
Brands can target healthy lifestyles to increase consumption
Promotion of organic and sustainable food
The Brazilian economy is struggling
Inflation is diminishing consumers' spending power
Figure 15: IPCA monthly change, by percentage, J anuary 2014-April 2016
Unemployment rate keeps increasing

## Key Players - What You Need to Know

Coca-Cola leads the market with $42.9 \%$ of share by value
British soft drink maker Britvic acquired Ebba
New line with fruit pieces

## Market Share

Coca-Cola is the market leader with $42.9 \%$ of market share by value
Britvic gains control of Ebba
Figure 16: Value shares in the juice retail market, 2014 and 2015
Figure 17: Volume shares in the juice retail market, 2014 and 2015
Increased competitiveness due to new entrants
Ambev acquires Do Bem and debuts in the juice market

## Who's Innovating?

Maguary launches new line with fruit pieces
Figure 18: Maguary Pedaços peach flavored, Brazil
Maguary Fruit Shoot focused on children
New cola flavor to compete with soft drinks
Reducing added sugar content
Figure 19: New Del Valle products, Brazil, 2015
Famiglia Zanlorenzi invests in vegetable juice products and snack juice

BUY THIS REPORT NOW

## Fruit J uice - Brazil - J une 2016

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 20: Famiglia Zanlorenzi's new product launches, Brazil, 2016
Packaged juice in bottles have seen substantial growth
Figure 21: New product launches of packaged fruit juice in carton, Brazil
Figure 22: New product launches of packaged fruit juice in bottle, Brazil
Glass bottles should be advertised as good for the environment
Figure 23: New products using glass bottles, Brazil
Figure 24: New product launches of packaged fruit juice, by type, Brazil 2012-16
The Consumer - What You Need to Know
Freshly squeezed juice and powdered juice are the main types
Juices boost high usage during lunch
Fruit juices are seen as a healthy

## Usage of Fruit J uice and Juice Drinks

Freshly-squeezed juice is the most popular juice type, drunk by $55 \%$ of consumers
100\% fruit juice products have been expanding
Figure 25: New product launches of 100\% fruit juice and juice drinks, Brazil 2011-16
Figure 26: Top 5 flavors in 100\% juice products, Brazil, 2011-16
Figure 27: Usage of fruit juice and juice drinks, Brazil, May 2016
Powdered juice is the main juice drink in Brazil
Figure 28: Powdered juice containing stevia, Argentina and the US
Nectar is the most consumed RTD packaged juice
Figure 29: Usage of fruit juice and juice drinks, Brazil, May 2016

## Occasions for Drinking Juice

Juices are most consumed as part of lunch
Figure 30: Occasions for drinking fruit juice and juice drinks, by age, Brazil, May 2016
Figure 31: Juice products aimed at meals, worldwide
$16 \%$ of juice drinkers drink juice as a replacement for breakfast
Figure 32: Occasions for drinking fruit juice and juice drinks, by age, Brazil, May 2016
Figure 33: Juice products aimed at replacing meals, worldwide
Drinking juice as a snack is only done by $11 \%$
Figure 34: Juice products aimed at snacking, worldwide
Consumption of juice as a snack presents an upmarket skew
Figure 35: Occasions for drinking fruit juice and juice drinks, by socioeconomic group, Brazil, May 2016
Figure 36: Orbis Healthy Kenshoku Bijin, Japan
Figure 37: Occasions for drinking fruit juice and juice drinks, Brazil, May 2016

## Attitudes toward Juice and Juice Drinks

Fruit juices enjoy a positive image
Improving credentials of fruit juice products for children
Figure 38: Juice products aimed at children

## Fruit J uice - Brazil - J une 2016

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 39: Juice products containing vegetables aimed at children

## Adding fruit pieces for a more sensorial experience

Figure 40: Fruit juice products with fruit pieces, worldwide
Figure 41: Attitudes toward juice and juice drinks, Brazil, May 2016

## Interest in New Products

$100 \%$ fruit juice beverages are the most likely to benefit among new products
Figure 42: New products containing organic ingredients, Brazil
Alternatives to reduce sugar content
Figure 43: Products using apple juice to replace sugar, Brazil
Beverages with added functional benefits attracts $18 \%$ of consumers
Figure 44: New products containing functional benefits, Brazil
Adding grains to create healthier products
Figure 45: Juice products with added grains/seeds, worldwide
Using locally-sourced ingredients to promote freshness
Figure 46: Highlighting locally-sourced ingredients on the packaging
Only 7\% of consumers would pay more for cold-pressed juices
Figure 47: New cold-pressed juice products, Brazil
Figure 48: Interest in new juice products, Brazil, May 2016

## Appendix - Market Size and Forecast

Figure 49: Value sales for juice, Brazil, 2011-21
Figure 50: Volume sales for juice, Brazil, 2011-21

## Appendix - Methodology and Definitions

Fan chart forecast
Abbreviations

