

Report Price: £3254.83 | \$4395.00 | €3662.99

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



"Total sales of juice are in decline due to falling sales of 100% juice and bottled smoothies paired with flat juice drink sales."

- Caleb Bryant, Senior Foodservice Analyst

# This report looks at the following areas:

- Falling sales of 100% juice and smoothies
- Sugar concerns are behind the decline of 100% juice
- Juice loses out to other drinks

Changing perceptions around the healthfulness of juice and competition from other drinks is causing consumers to choose other drinks over juice. New juice products that better target specific occasions and those with strong functional claims can stand out in the juice market.

# BUY THIS REPORT NOW

**VISIT:** store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

**EMAIL:** reports@mintel.com

**DID YOU KNOW?** 

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £3254.83 | \$4395.00 | €3662.99

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

Definition

#### **Executive Summary**

The issues

#### Falling sales of 100% juice and smoothies

Figure 1: Total US retail sales and forecast of juice, juice drinks, and smoothies, by segment, at current prices, 2013-23

#### Sugar concerns are behind the decline of 100% juice

Figure 2: Reasons for not buying 100% fruit juice, April 2018

#### Juice loses out to other drinks

Figure 3: Beverage associations, April 2018

#### The opportunities

#### iGens are interested in innovative juices

Figure 4: Juice product interest, by iGens, April 2018

#### Parents are core consumers

Figure 5: Beverage purchases, by generation and parental status, April 2018

# Opportunity for less-sweet juices

Figure 6: CHAID analysis, juice attitudes, April 2018

What it means

# The Market - What You Need to Know

Juice market trends downward

Foodservice juices serve as a point of inspiration

Taxes, hurricanes, and the FDA are all shaping the future of juice

#### **Market Size and Forecast**

# Forecasted declines for juice market

Figure 7: Total US sales and fan chart forecast of juice, juice drinks, and smoothies, at current prices, 2013-23

Figure 8: Total US retail sales and forecast of juice, juice drinks, and smoothies, at current prices, 2013-23

# **Market Breakdown**

## 100% juice drags down total market

Figure 9: Total US retail sales and forecast of juice, juice drinks and smoothie, by segment, at current prices, 2013-23

Figure 10: Total US retail sales and forecast of juice, juice drinks, and smoothie, by segment, at current prices, 2013-23

Figure 11: US per capita volume consumption of juice, juice drinks, and nectars, 2012-21

## **Market Perspective**

Water sales skyrocket

Performance/nutrition drinks go free-from

BUY THIS REPORT NOW VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £3254.83 | \$4395.00 | €3662.99

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

#### Juice flavor inspiration comes from foodservice

Figure 12: Any juice consumption AFH, October 2016-March 2018

## Foodservice juice and smoothie flavor trends

Figure 13: Menu Matrix, juice ingredient flavors, top 10 flavors, Q1 2015-18

Figure 14: Menu Matrix, juice ingredient flavors, top 11-20 flavors, Q1 2015-18

Figure 15: Menu Matrix, smoothie ingredient flavors, top 10 flavors, Q1 2015-18

Figure 16: Menu Matrix, smoothie ingredient flavors, top 11-20 flavors, Q1 2015-18

#### **Market Factors**

No relief for the OJ market

An unusually bad flu season benefits juice

Soda taxes taper off but is the damage done?

The future of fiber

#### **Key Players - What You Need to Know**

100% juice brands experience continued losses

Premium juice and reformulated products show opportunity

The future of juice includes hydration, relaxation, and sustainability

#### **Company and Brand Sales of Juices**

# Most leading brands face declines

Figure 17: MULO sales of juice, juice drinks, and smoothies, by leading companies, rolling 52-weeks ending Feb. 25, 2018

## Sales decline across the board within the 100% juice segment

Figure 18: MULO sales of 100% juice, by leading companies and brands, rolling 52-weeks ending Feb. 25, 2018

# The juice drink market is highly fragmented

Figure 19: MULO sales of juice drinks, by leading companies and brands, rolling 52-weeks ending Feb. 25, 2018

# Strong decreases in smoothie market

Figure 20: MULO sales of smoothies, by leading companies and brands, rolling 52-weeks ending Feb 25, 2018

## What's Working?

# Kids juice brands change with the times

#### Pomegranate juice stands out in the 100% juice market

Figure 21: MULO sales of POM Wonderful, 2014-17

Figure 22: Attribute rating, POM Wonderful vs all juices, T2B 5-pt scale

Figure 23: Online ad, "POM Wonderful Presents: Impaled by a Dolphin and Better Than Ever"

#### Brands capitalize on the popularity of coconut

## Coca-Cola still growing its lemonade sales

Figure 24: Purchase intent, lemonades vs all juices excluding lemonade, T2B 5-pt scale

Figure 25: Attribute rating, lemonades vs all juices excluding lemonade, T2B 5-pt scale

Figure 26: Commercial "Little League. this is GOOD. Minute Maid"

# Suja leads the premium juice market

## What's Struggling?

BUY THIS REPORT NOW VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £3254.83 | \$4395.00 | €3662.99

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

#### Competition and sugar likely weakening smoothie market

#### Major losses in 100% juice formats

Figure 27: MULO sales of 100% juice, by format, 2017-18

Figure 28: MULO sales of 100% juice, refrigerated juices, 2017-18

## SS juice drinks fall victim to changing consumer preferences

#### What's Next?

## Cold pressed juices become accessible

Figure 29: Cold pressed juice launches, branded vs private label, 2013-18

Figure 30: 7-Select Go! Smart Organic Cold Pressed Juice

## Coconut opens the door for alternative plant-based waters

Juice brands take up social causes

Can juice break into the evening occasion?

CBD creates new opportunities

## Floral juices can be the next trendy mixer

Figure 31: Cocktail ingredient flavors, top 10 floral flavors with strongest growth, Q1 2015-Q1 2018

#### The Consumer - What You Need to Know

Juice falls behind other drinks

Sugar concerns are one of the biggest issues the juice market faces

Innovative products represent an opportunity for growth

Competing drinks outperform bottled smoothies

# **Beverage Purchases**

# Overall purchase incidence is high, but juices fall behind other drinks

Figure 32: Beverage purchases, April 2018

# Younger consumers drive juice drink sales

Figure 33: Beverage purchases, by generation, top five beverages purchased, indexed (excluding nets), April 2018

# Parents are key juice buyers

Figure 34: Beverage purchases, by generation and parental status, April 2018

Figure 35: Beverage purchases, by Millennial parents and gender, April 2018

Figure 36: Beverage purchases, by age of child (discrete choices), April 2018

#### Reasons for Not Buying 100% Fruit Juice

# Sugar content deters juice purchases

Figure 37: Reasons for not buying 100% fruit juice, April 2018

# Women question the healthfulness of juice

Figure 38: Reasons for not buying 100% fruit juice, by gender, April 2018

Figure 39: Reasons for not buying 100% fruit juice, by gender and age, April 2018

## **Beverage Consumption by Daypart**

#### Juice drinks are associated with afternoon occasions

Figure 40: 100% juice consumption by daypart, among drinkers, April 2018

BUY THIS REPORT NOW VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 41: Beverage consumption by daypart, among beverage drinkers, April 2018

#### **Beverage Associations**

#### Master of none?

Figure 42: Beverage associations, health/functionality associations, April 2018

Figure 43: Beverage associations, other associations, April 2018

### **Juice Important Factors**

#### Clean labels and low sugar are critical

Figure 44: Important factors when purchasing juice, April 2018

#### iGens/Millennials look for tertiary juice attributes

Figure 45: Important factors when purchasing juice, any rank, by generation, April 2018

#### Millennial parents on the lookout for healthy juices

Figure 46: Important factors when purchasing juice, any rank, by generation and parental status, April 2018

#### **Juice Product Interest**

#### High interest in functional juices

Figure 47: Juice product interest, April 2018

#### iGens want to chill out with juices

Figure 48: Juice product interest, by generation, April 2018

# Blends are a hit with moms

Figure 49: Juice product interest, by Millennial parents and gender, April 2018

# Set the trend with unique juices

Figure 50: Juice product interest, by food and drink shopper segmentation, April 2018

# **Bottled Smoothie Competitors**

# Many drinks satisfy similar needs

Figure 51: Bottled smoothie competitor appeal, April 2018

Figure 52: Bottled smoothie competitor appeal, by food and drink shopper segmentation, April 2018

#### Bottled smoothie brands have difficulty reaching new consumers

Figure 53: Bottled smoothie competitor appeal, by bottled smoothie buyers and non-buyers, April 2018

# **Juice Attitudes**

#### Consumers are paying attention to juice labels

Figure 54: Juice attitudes, April 2018

#### A new juice sensation may appeal to iGens

Figure 55: Juice attitudes, by generation, April 2018

#### Less-sweet juices may attract non-buyers

Figure 56: CHAID analysis, juice attitudes, April 2018

# **Appendix - Data Sources and Abbreviations**

Data sources

Sales data

BUY THIS REPORT NOW VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £3254.83 | \$4395.00 | €3662.99

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

Fan chart forecast

Consumer survey data

Mintel Menu Insights

Purchase Intelligence

Mintel Market Sizes

Mintel Food and Drink Shopper Segmentation

Abbreviations and terms

Abbreviations

# **Appendix - The Market**

Figure 57: Total US retail sales and forecast of juice, juice drinks and smoothies, at inflation-adjusted prices, 2013-23

Figure 58: Total US retail sales of juice and juice drinks, by segment, at current prices, 2016 and 2018

Figure 59: Total US retail sales and forecast of 100% juice, at inflation-adjusted prices, 2013-23

Figure 60: Total US retail sales and forecast of juice drinks, at inflation-adjusted prices, 2013-23

Figure 61: Total US retail sales and forecast of smoothies, at inflation-adjusted prices, 2013-23

**VISIT:** store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300