## Juice and Juice Drinks - US - June 2018

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:

- Falling sales of $\mathbf{1 0 0 \%}$ juice and smoothies
- Sugar concerns are behind the decline of $\mathbf{1 0 0 \%}$ 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.
"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



## Juice and Juice Drinks - US - June 2018

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

## Juice and Juice Drinks - US - June 2018

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

## Juice and Juice Drinks - US - June 2018

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

## Juice and Juice Drinks - US - June 2018

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

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

## Juice and Juice Drinks - US - June 2018

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

