

## Juice and Juice Drinks - US - April 2019

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.



"The juice market struggles with a sugary, unhealthy reputation and stiff competition from other beverages. However, younger adults, parents and Hispanics show high engagement and strong interest in new flavors and functional claims in beverages, which create opportunity for expanding reach and consumption occasion."  
**- Mimi Bonnett, Director - Food and Drink, Foodservice**

This report looks at the following areas:

- Juice market takes another sales blow
- Sugar, calories, and weight drive down juice consumption
- Juice garners mixed consumer perceptions; loses out on hydration
- Generation Z and Millennials can re-energize the market
- Get functional
- Get clean

**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

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

# Juice and Juice Drinks - US - April 2019

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

Juice market takes another sales blow

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

Sugar, calories, and weight drive down juice consumption

Figure 2: Reasons for drinking less juice or juice drinks, January 2019

Juice garners mixed consumer perceptions; loses out on hydration

Figure 3: Qualities associated with different types of drinks, January 2019

The opportunities

Generation Z and Millennials can re-energize the market

Figure 4: Consumption frequency compared to a year ago, by generation, January 2019

Get functional

Figure 5: Beverage features and functionality interest, January 2019

Get clean

Figure 6: Factors considered important when purchasing, by generation, January 2019

What it means

### The Market – What You Need to Know

Category struggles continue

Bottled water leads the competitive set

Better-for-you hybrids will become the norm

### Market Size and Forecast

Juice market falls to \$19.2 billion and future decline forecast

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

Juice drinks comprise half of market share

Figure 9: Share of total sales in juice and juice drinks market, by segment, 2018

100% juice and smoothies watering down performance

Figure 10: Total US retail sales of juice and juice drinks, by segment, at current prices, 2016 and 2018

### Market Perspective

Innovation in crowded market chipping away at juice

Figure 11: Total US retail sales and forecast of non-alcoholic drinks, by category, at current prices, 2012-22

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Juice and Juice Drinks - US - April 2019

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.

Harnessing the power of water

Plant-based performance and nutrition drinks chip away at smoothies

## Market Factors

Sugar remains public enemy #1

Figure 12: reasons for reduced juice and juice drink consumption

High obesity rates drive consumer demand for lower-sugar, low-calorie drinks

Figure 13: Trends in obesity prevalence among adults aged 20 and over (age adjusted), 1999-2000 through 2015-16

FDA labeling and sugar taxes raise awareness and cost of sugary drinks

Older Americans growing in population share and focus on health

Foodservice operators both a catalyst and competition for RTD juice

## Key Players – What You Need to Know

Leader boards' weakening sales indicate shifting landscape

Juice drinks go BFY, hybrid for small gains as 100% juice and smoothies struggle

On the horizon: tart tastes, super-food veggies, aloe vera, and maybe CBD

## Company and Brand Sales of Juices

Major suppliers slipping

Figure 14: MULO sales of juice, juice drinks, and smoothies, by leading companies, rolling 52 weeks 2018 and 2019, weeks ending January 28, 2018 and January 27, 2019

## What's Working?

Flexibility, innovation nudge juice drinks to be so much more than juice

Classic lemonades and cool updates find success

"Blended" juice drinks with tea, carbonation, and coconut juice

Pomegranate juice remains wonderful in 100% juice segment

Private-label grows share, making gains in juice drinks and smoothies

Figure 15: MULO private label sales, by segment, 2017-18

Cold-pressed juice space getting competitive

Kombucha teas edge into mainstream, driven by Pepsi's Kevita and private label

## What's Struggling?

100% juice, orange juices, struggle to reverse the slide

Smoothies marked by competition and high sugar content

Shelf-stable juice drinks struggle to grow

## What's Next?

Tart cherry, berries, and melon in juices

Beets and broccoli and kale, oh my

Botanicals and tree waters are the new coconut water

Adultification of juices could refresh the category

Juice drinks function shifts gears to relaxation

## The Consumer – What You Need to Know

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Juice and Juice Drinks - US - April 2019

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.

Penetration is high overall  
 Juicers seek nutritious treat  
 Sugar concerns trigger reduction  
 Brand falls short of flavor, price in purchase factors  
 High interest in tart flavors and natural sweeteners  
 Functionality can create or extend consumption drivers, occasions

### Juice Purchase

Nearly nine in 10 have purchased juice in past three months

Figure 16: Beverage purchases, January 2019

Gen Z and Millennials comprise key consumer groups

Figure 17: Any juice or juice drinks purchased in past three months, by generation, January 2019

Younger consumers drive juice drink sales

Figure 18: Juices and juice purchased, top five beverages purchased, by generation, January 2019

Families drive sales in the juice market

Figure 19: Any juice or juice drinks purchased in past three months (net), by parental status, January 2019

Figure 20: Juice and juice drink purchases, by parental status, January 2019

Juice drinks, punch fit the bill for parents of kids under 11

Figure 21: Beverage purchases, by age of child (discrete choices), January 2019

### Increased Consumption of Juice and Juiced Drinks

About a fifth report consuming more juice than a year ago

Figure 22: Consumption frequency compared to a year ago, January 2019

Young adults, Gen Zs, drinking more juice

Figure 23: Consumption frequency compared to a year ago, by generation, January 2019

Parents and Hispanics more likely to drinking more

Figure 24: Consumption frequency compared to a year ago, by parental status and Hispanic origin, January 2019

### Reasons for Consumption Changes

Healthy indulgence is a hallmark for category innovation

Figure 25: Reasons for not drinking the same amount of juice or more juice, January 2018

Men cite a wider range of motives for juice consumption

Figure 26: Reasons for not drinking the same amount of juice or more juice, by gender, January 2018

Gen Zs drink more in quest for new flavors, formats, and occasions

Figure 27: Reasons for not drinking the same amount of juice or more juice, by generation, January 2018

Parents eager for more flavors

Figure 28: Reasons for not drinking the same amount of juice or more juice, by parental status, January 2018

### Reasons for Reduced Juice Consumption

Sugary reputation drives down juice consumption

Figure 29: Reasons for drinking less juice or juice drinks, January 2019

Women are especially concerned with juice's sugar and calories

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Juice and Juice Drinks - US - April 2019

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.

...and men are more price sensitive

Figure 30: Reasons related to taste, diet, and sugar, for drinking less juice or juice drinks, by gender, January 2019

Aging enhances sugar concerns

Figure 31: Reasons for drinking less juice or juice drinks, by generation, January 2019

### Motivating Factors When Selecting Juice/Juice Drinks

Clean, low-sugar formulations fall short of flavor and price

Figure 32: Factors considered important when purchasing juice and juice drinks, January 2019

Flavor and sugar top the wish list

Figure 33: TURF analysis – Important juice factors, January 2019

“Free from” identity key to reaching women

Figure 34: Factors considered important when purchasing, by gender, January 2019

Older consumers seek mix of hard claims, while flavor is first for Gen Z

Figure 35: Factors considered important when purchasing, by generation, January 2019

Hispanic consumers seek organic, cold-pressed juices

Figure 36: Factors considered important when purchasing, by Hispanic origin, January 2019

### Beverage Quality Associations

100% juice and smoothies widely seen as tasty, nutritious, and natural

Juice drinks are tasty but also high-sugar and less natural

Water serves as a model for all drinks

Figure 37: Correspondence analysis – Symmetrical map – Competitive context, January 2019

### Flavor and Ingredient Interest

Citrus and berry flavors plus natural sweeteners

Figure 38: Beverage flavor and ingredient interest, January 2019

Gen Z eager for more flavors and natural sweeteners

Figure 39: Flavor interest, by generation, January 2019

Millennial consumers eager for more varied, subtle, and sophisticated flavor notes

Figure 40: Flavor interest, part II, by generation, January 2019

Younger consumers eager for juices with superfoods and CBD

Figure 41: Ingredient interest, by generation, January 2019

Drinks with superfoods and natural sweeteners appeal to parents

Figure 42: Juice flavor and ingredient interest, by parental status, January 2019

### Features and Functionality Interest

Opportunity is strong for juices offering functional benefits

Figure 43: Beverage features and functionality interest, January 2019

Men eager for juices to boost energy, women to enhance beauty

Figure 44: Beverage features and functionality interest, by gender, January 2019

Gen Z looks to juices for energy and relaxation

Figure 45: Beverage features and functionality interest, by generation, January 2019

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Juice and Juice Drinks - US - April 2019

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.

### Millennials seek digestion and immunity

Figure 46: Beverage features and functionality related to beauty and digestion, by generation, January 2019

### Parents are eager for multifunctional juices

Figure 47: Beverage features and functionality interest, by parental status, January 2019

## Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Mintel Market Sizes

Abbreviations and terms

Abbreviations

Methodology – Correspondence analysis

Methodology – TURF Analysis

## Appendix – The Market

Figure 48: Total US retail sales and forecast of juice, juice drinks and smoothies, at inflation-adjusted prices, 2013-23

Figure 49: Total US retail sales of juice and juice drinks, by segment, at current prices, 2016 and 2018

Figure 50: Total US retail sales of 100% juice, at inflation-adjusted prices, 2013-18

Figure 51: Total US retail sales of juice drinks, at inflation-adjusted prices, 2013-18

Figure 52: Total US retail sales of smoothies, at inflation-adjusted prices, 2013-18

Figure 53: MULO sales of 100% juice, by leading companies and brands, rolling 52 weeks 2018 and 2019

Figure 54: MULO sales of juice drinks, by leading companies and brands, rolling 52 weeks 2018 and 2019

Figure 55: MULO sales of smoothies, by leading companies and brands, rolling 52 weeks 2018 and 2019

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)