“Consumers will increasingly look for products that offer functional benefits, especially those related to immunity boost, in the short and medium term. It is also important to emphasize that Brazilians’ average income has dropped significantly, which has led many to focus on cost cutting.”

– Laura Menegon, Food and Drinks Analyst

This report looks at the following areas:

- The impact of COVID-19 on consumer behavior and the juice market.
- The impact of the economic recession and what companies can do to mitigate its effects.
- The most important purchase drivers.
- The innovations that appeal to consumers.

The juice market has benefited from the growing interest in healthy products. As suggested by Mintel’s Global Trend Driver Wellbeing, consumers want products and services that improve their physical and mental wellbeing. The COVID-19 pandemic has intensified this movement as people have worried more about their health. Additionally, the economic crisis that hit the country even before the pandemic has worsened, leading consumers to migrate to cheaper brands and categories. This scenario should remain the same in the coming years, as forecasts show that the country’s economic recovery will happen very slowly.
Overview

What you need to know
Key issues covered in this Report
Definition
Excluded

Executive Summary

Market overview
The impact of COVID-19 on juice
  Figure 1: Expected impact of COVID-19 on juice, in the short, medium and longer term, July 2020
The impact so far
Short and medium term (2 years)
Long term (2-5 years)
Challenges
Lower family income may impact more expensive segments
Sugar should represent the most significant consumption barrier
Opportunities
Immune system concerns boost juice consumption
Private label nectar juice can appeal to C12 and DE consumers
Addition of vitamin D can boost sales of juice concentrates among families and the elderly
Fruit juice with plant-based milk could be consumed as a snack
What we think

Market Drivers

Worsening of Brazil’s economic crisis reduces household income
Competition with Asian countries impacts green coconut producers
Orange juice exports grow 16% in 11 months

Key Players – What You Need to Know

Market leaders invest in new products
Products for kids and with no added sugar dominate the market launches
Organic ingredients and private labels with premium positioning have space to grow in Brazil
Innocent Juices keep growing thanks to a new range, and Pulp & Press expands with branding campaign

Market Share

Coca-Cola leads
  Figure 2: Leading companies’ retail sales share of juice, by value – Brazil, 2018-19
  Figure 3: Leading companies’ retail sales share of juice, by volume – Brazil, 2018-19

Marketing Campaigns and Actions

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Do Bem launches new range for kids
Figure 4: Do Bemzinho campaign, Brazil, June 2020

Life Mix launches range of functional juices

Liv Up enters the natural juice segment
Figure 5: Liv Up new range launch, Brazil, October 2019

Del Valle launches new natural range with no added sugar or preservatives

Del Valle launches Fruit + Vegetables range

Who’s Innovating?

Organic ingredients can appeal to AB consumers
Figure 6: Top 3 ingredients’ positioning in the five largest juice markets, 2017-2019

Launches of premium private label juices can grow
Figure 7: Launches of private label premium juices per region, 2017-19

Case Studies

Innocent Drinks grows during the crisis, thanks to juice range reformulation

Pulp & Press expands by investing on branding
Figure 8: Pulp & Press campaign

The Consumer – What You Need to Know

Family-sized juice concentrates can attract consumers who are willing to save money

Private label nectar juice can appeal to C12 and DE consumers

Multipacks with varied flavors can attract consumers who are stocking up on groceries

Addition of vitamin D can boost sales of juice concentrates among families and the elderly

Fruit juice with plant-based milk could be consumed as a snack

Juice shots with functional benefits can appeal to women

Juice Consumption

Family-sized juice concentrates can attract consumers who are trying to save money
Figure 9: Juice consumption, Brazil, May 2020

Powdered juice with fruit and vegetable flavor can attract parents
Figure 10: Juice consumption, by parents of children up to 18 years old, Brazil, May 2020

Smoothie kits can attract consumers aged 25-34
Figure 11: Juice consumption, smoothie, by age, Brazil, May 2020

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Coconut water brands could emphasize local production
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Private label nectar juice can appeal to C12 and DE consumers
Figure 13: Juice consumption frequency, ready-to-drink nectar juice, by socioeconomic group, Brazil, May 2020

Reasons to Consume Powdered Juice

Powdered juices that boost immunity can attract consumers

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Figure 14: Reasons to consume powdered juice, Brazil, May 2020

Multipacks with varied flavors can attract consumers who are stocking up on groceries
Powdered juice mixed with iced tea can appeal to consumers who like to try a wide variety of flavors

Figure 15: Interest in buying, by reasons to consume powdered juice, Brazil, May 2020

Addition of vitamin D can boost sales of juice concentrates among families and the elderly
Juices with probiotics can attract consumers who seek good physical and mental health
Organic juices with sustainability claims can boost consumption among the AB

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Figure 17: Most important claims, Brazil, May 2020
Figure 18: Most important claims, organic, by socioeconomic group, Brazil, May of 2020
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Fruit juices mixed with iced tea are seen as refreshing
Fruit juice with plant-based milk could be consumed as a snack
Ready-to-drink 100% juice with added protein can attract consumers who seek nutritious products

Figure 20: Attributes by subcategory, fruit juice with plant-based milk, Brazil, May 2020
Figure 21: Attributes by subcategory, ready-to-drink 100% juice, Brazil, May 2020

Interest in Buying

Powdered juices mixed with plant-based milk have potential to attract consumers
Juice shots with functional benefits can appeal to women

Figure 22: Interest in buying, Brazil, May 2020
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Appendix – Market Size and Market Share

Market Size
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