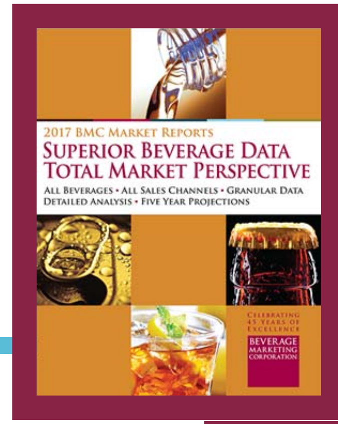
U.S. Fruit Beverages Topline

2017 Edition (Published August 2018. Data through 2017. Market projections through 2022.) More than 20 pages, with text analysis, graphs and charts.



This topline report provides a brief overview of the fruit beverage category with key data and five-year forecasts. Perfect for investors, entrepreneurs requiring statistics for their business plan, ad agencies preparing an account pitch or anyone who needs a quick view of the sector.

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INSIDE:

HAVE QUESTIONS?

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The answers you need

U.S. Fruit Beverages Topline offers a concise summary of the overall fruit juice market. Questions answered include:

- How much fruit juice is consumed per capita in the United States, how has this changed in recent years, and what trends are behind these developments?
- How did various market segments perform in 2017, and how are they like to develop in the future?
- How much of the fruit juice consumed in the United States is imported? How much fruit juice is exported?
- Which fruit beverage brands have the biggest shares of fruit beverage revenues?
- What is the share of the fruit beverage market held by the principal distribution channels?
- Which segment of the market is expected to perform best by 2022 - juice or drinks?

This report features

The *Fruit Beverage Topline* contains key information and identifies important trends concerning the U.S. industry. It features category volume, wholesale dollar sales and per capita consumption data, leading brand market shares and five-year projections.

U.S. Fruit Beverages Topline

August 2018

BEVERAGE MARKETING CORPORATION

RESEARCH ● DATA ● CONSULTING

NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

Table of Contents

Contents

TABLE OF CONTENTS

Summary

Appendix

In addition to superfruits and diet fruit beverages, fruit beverage marketers have explored other avenues to increase sales.

- Ocean Spray and Apple & Eve market products in the sparkling fruit drink/juice segment, but others such as Welch's and Nestlé's Juicy Juice did not see enough sales to continue their sparkling juice drinks. Even Apple & Eve's sparkling juice, Fizz Ed, struggled, but the company acquired the sparking fruit drink brand, The Switch.
- PepsiCo entered the category when it acquired Izze in 2006. Because Izze was an established brand already, and since it operates at arm-length from PepsiCo, its long-term success seems more assured than the others' ancillary entries. In fact, PepsiCo is pleased enough with the brand to introduce new sublines for the brand.
- Tea-lemonade blends (i.e., half-and-half or "Arnold Palmer") have had a successful history, but these are generally classified as teas rather than fruit beverages. Juice companies that have attempted to add tea to their juices have been less successful,
- Fruit beverage marketers have also taken note of the success of Campbell's V8 brand, which includes 100% vegetable juices, vegetable/fruit drink blends and vegetable/fruit juice blends. PepsiCo's Naked Juice has a Fruit & Veggies line that has endured, while Dr Pepper Snapple's Mott's has come out with both a fruit and vegetable juice blend (Mott's Medleys) and a 100% vegetable juice line. (An earlier 100% vegetable juice line, Mott's Garden Blend, did not last.) However, Mott's Medleys appears to have been discontinued and Ocean Spray's Fruit & Veggie Juice line proved short-lived. Apple & Eve markets Fruitables vegetable/fruit drink blend.
- Campbell Soup Company itself married two trends by introducing a sparkling fruit/vegetable line in slim cans.

A few other items are worthy of note.

- PepsiCo's Naked Juice has skyrocketed ahead of Coca-Cola Odwalla in the better-for-you fruit beverage segment. However, in the past few years, Odwalla has staged a comeback — finally abandoning an ill-advised attempt to reduce its main package from 15.2- to 12-ounces. Although Odwalla's double-digit rise in 2014 seemed to impact Naked's usually robust growth, the latter has done an admirable job branching out into other segments such as coconut water and vegetable juices. Although a test of oat-based drinks did not succeed, it has released an almondmilk line and resumed brisker growth in 2015. In 2016, however, Odwalla declined while Naked grew. In 2017, both brands decreased.

Exhibit 4

U.S. FRUIT BEVERAGE MARKET SEGMENTS

CHANGE IN VOLUME

2013 – 2022(P)

Segments	2012/13	2013/14	2014/15	2015/16	2016/17	CAGR 2017/22(P)
Fruit Juices	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Fruit Drinks	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(P) Projected

CAGR: Compound Annual Growth Rate

Source: Beverage Marketing Corporation; Florida Department of Citrus