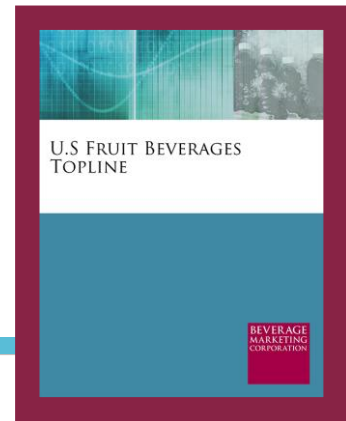


U.S. FRUIT BEVERAGES TOPLINE

2018 EDITION (Published July 2019. Data through 2018.
Market projections through 2023.) More than 15 pages, with text analysis
tables 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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**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 2018, 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 2023 - 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

**BEVERAGE
MARKETING
CORPORATION**

U.S. Fruit Beverages Topline July 2019



RESEARCH • DATA • CONSULTING

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

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One of the more exciting developments in the fruit beverage marketing over the last several years has been the emergence of superfruits. While superfruits have been known for decades, POM Wonderful brought the concept to a wider audience with its pomegranate juices.

- It is well known that energy drink marketers have convinced consumers to buy into the efficacy of liquid energy boosts. What is not as often talked about is the seeming mania for antioxidants. One reason may be that energy drinks are more brashly marketed to their youthful target audience than antioxidant beverages are to the older people that comprise its audience.
- POM Wonderful was able to quench a consumer desire via an antioxidant juice that had eye-catching packaging and a hip positioning. Its success spurred others in the industry to introduce their own pomegranate SKUs.
- Meanwhile, some well-known fruits have been laying claims to superfruit status, as evidenced by Sunsweet's marketing messages on prunes. The Cherry Marketing Institute, a trade group of tart cherry growers and processors, also has pursued the superfruit angle, averring cherries' anti-inflammatory properties. This has dovetailed with the increasingly accepted theory that inflammation is a key factor for conditions as serious as cancer and heart disease.
- Ocean Spray has thus supplemented its Cran-Cherry fruit drink with several other cherry products. Tree Top's Northwest Naturals unit produces cherry juice concentrates for use in juices and juice drinks. Cheribundi is a small entrepreneurial brand that is making strides in the space.
- It can even be argued that these superfruit juices have stolen some share from orange juice now that the latter has become less affordable.

The launch of Trop50 had observers watching to see whether the diet fruit beverage segment would finally take off.

- Reduced-calorie products have traditionally formed a much lower proportion of the fruit beverage than of the carbonated soft drink (CSD) market. But with the Food and Drug Administration's approval of stevia-based rebaudioside A (Reb A) for use in foods and beverages led to the introduction of Reb A-sweetened Trop50 in 2009. The product has been fairly successful in its first decade, although sales have gone sideways in the past eight years. Reb A also found its way into Coca-Cola's Odwalla superpremium juice brand. PepsiCo also snuck it into several SoBe flavors.

Exhibit 3

**U.S. FRUIT BEVERAGE MARKET SEGMENTS
SHARE OF VOLUME
2013 – 2023(P)**

Segments	2013	2014	2015	2016	2017	2018	2023(P)
Fruit Juices	███ %	███ %	███ %	███ %	███ %	███ %	███ %
Fruit Drinks	███ %	███ %	███ %	███ %	███ %	███ %	███ %
TOTAL	█████ %	█████ %	█████ %	█████ %	█████ %	█████ %	█████ %

(P) Projected

Source: Beverage Marketing Corporation; Florida Department of Citrus

Exhibit 8

**FRUIT BEVERAGE MARKET
SHARE BY SEGMENT
2013 – 2023(P)**

Types	2013	2014	2015	2016	2017	2018	2023(P)
Shelf-Stable	███ %	███ %	███ %	███ %	███ %	███ %	███ %
Chilled, Ready-to-Serve	███ %	███ %	███ %	███ %	███ %	███ %	███ %
Frozen Concentrate	███ %	███ %	███ %	███ %	███ %	███ %	███ %
TOTAL	█████ %	█████ %	█████ %	█████ %	█████ %	█████ %	█████ %

(P) Projected

Source: Beverage Marketing Corporation; Florida Department of Citrus
