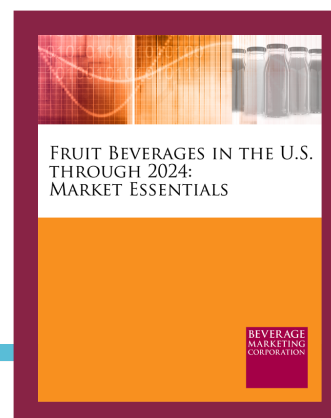


FRUIT BEVERAGES IN THE U.S. THROUGH 2024: MARKET ESSENTIALS

2019 EDITION (Published July 2020. Data through 2019.

Market projections through 2024.) More than 175 Excel tables plus an executive summary detailing trends and comprehensive profiles of leading companies, their brands and their strategies.



Against a backdrop of topline global trends, this report provides in-depth coverage of the U.S. fruit beverage market and its key sub-segments including juices, juice blends, fruit drinks, refrigerated, shelf stable, concentrates and organic. It also breaks out nectars and superpremium juice. Five-year U.S. market forecasts are provided.

The report presents the data in Excel spreadsheets, which it supplements with an executive summary highlighting key developments including the upheaval brought on by the coronavirus pandemic as well as a detailed discussion of the leading fruit beverage companies.

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**HAVE
QUESTIONS?**

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**BEVERAGE
MARKETING
CORPORATION**

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THE ANSWERS YOU NEED

This year's edition includes five-year forecasts on a broad range of topics, making it an even better tool for spotting trends and opportunities in the fruit beverages industry and determining where to focus future resources for maximum success. Questions answered in this in-depth market report include:

- Which companies and brands in the United States experienced growth in 2019 and which did not?
- How much fruit juice is consumed per capita in the United States and how has this changed in recent years?
- How did the various market segments perform in 2019, and how are they like to develop over the next five years?
- Which nations ship the most fruit juices to the U.S. and where are the leading destinations for U.S. juice?
- Which flavors of fruit beverages are growing the fastest? How will flavor by flavor market share trends shift over the next five years? How will fruit drink flavor trends differ from pure fruit juice trends?
- Which segment of the market is expected to perform better through 2024 — juices or drinks?

THIS FRUIT BEVERAGES RESEARCH REPORT FEATURES

The report surveys the landscape of this stalwart beverage category, with volume, retail dollar, wholesale dollar and per capita consumption figures.

All aspects of the market are considered, including segmentation by package size, distribution channels, flavor and processing method. Powdered and organic statistics are included along with advertising and demographic data. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers get a thorough understanding of all facets of the market including:

- Historical and current statistics and BMC's exclusive projections on multiple facets of the market.
- A look at the U.S. regional markets, with past, current and future volume and growth of fruit juice and fruit drinks.
- Detailed profiles and analysis of the leading companies and brands, discussions of their marketing activities and distribution strategies as well as company and brand sales and volume data. Coverage includes PepsiCo/Tropicana Products, Coca-Cola/Minute Maid, Ocean Spray, Keurig Dr Pepper, Florida's Natural Growers, Welch's, Brynwood Partners (Juicy Juice and Sunny Delight), The Kraft Heinz Company, Tree Top and Apple & Eve.
- Data on shelf-stable, from-concentrate and not-from-concentrate juices, frozen concentrate and chilled, ready-to-serve fruit beverages, nectars and superpremium juice through 2024.
- Fruit juice and drink volume by flavor and container type through 2024.
- Statistics on imported and exported fruit juices by flavor and country of origin and country of destination.
- Advertising expenditures of the leading companies and a look at category spending by media type (including internet advertising).
- Consumer demographic profiles comparing consumers of key brands.

- An overview of the powdered and organic fruit beverages segments and the key players.
- Five-year projections for the fruit beverage market including sub-segments, flavor trends, packaging, regions, sales channel and more.



FRUIT BEVERAGES IN THE U.S. THROUGH 2024: MARKET ESSENTIALS

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Fruit Beverages in the U.S. through 2024: Market Essentials

July 2020

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

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Through the years, the company has developed into the world's largest producer of fruit juices and drinks.

- It markets Minute Maid, Hi-C, Five Alive and Bright & Early branded fruit drinks, 100% from-concentrate juices, fruit punches and lemonades.
- The company, which pulled the plug on its not-from-concentrate juices in 1996, re-entered the not-from-concentrate arena in 2001.
- Minute Maid Company also produced frozen and shelf-stable Bacardi Mixers under license from Bacardi and Company.

In December 2001, Coca-Cola acquired Half Moon Bay, California-based Odwalla, Inc., which produced a variety of fresh packaged fruit and vegetable juices, dairy-free shakes, bottled water and nutrition bars. The deal was valued at \$181 million.

- Odwalla became the largest fresh packaged juice company despite suffering through what could have been a disastrous recall.
- In May 2013, Coca-Cola relocated Odwalla's headquarters from Half Moon Bay to Dinuba, California, where its production plant was located. None of the Half Moon Bay employees were retained. Odwalla operated as a separate unit within Minute Maid Company.
- However, in early July 2020, Coke shocked the market by announcing it would close down Odwalla by the end of the month. Some observers had criticized the company for skimping too much on quality over the years and its sales were no longer sufficient to justify maintaining an expensive fleet of refrigerated trucks, which will be sold instead of being transferred to Minute Maid.

The company's main product is Minute Maid Orange Juice.

- The basic varieties are Original, Country Style and Pulp Free.
- Minute Maid was the first company to introduce calcium-fortified orange juice in 1987. While calcium-fortified juice constituted approximately 30% of overall chilled orange juice sales, Minute Maid had even better success, with about 40% of its Premium orange juice sales rung up in the calcium-enhanced segment.

**U.S. FRUIT BEVERAGE MARKET
SHARE OF VOLUME BY REGION
2014 – 2024(P)**

Region	2014	2015	2016	2017	2018	2019	2024(P)
Northeast	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%
South	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%
East Central	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%
Pacific	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%
Southwest	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%
West Central	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%
West	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

(P) Projected

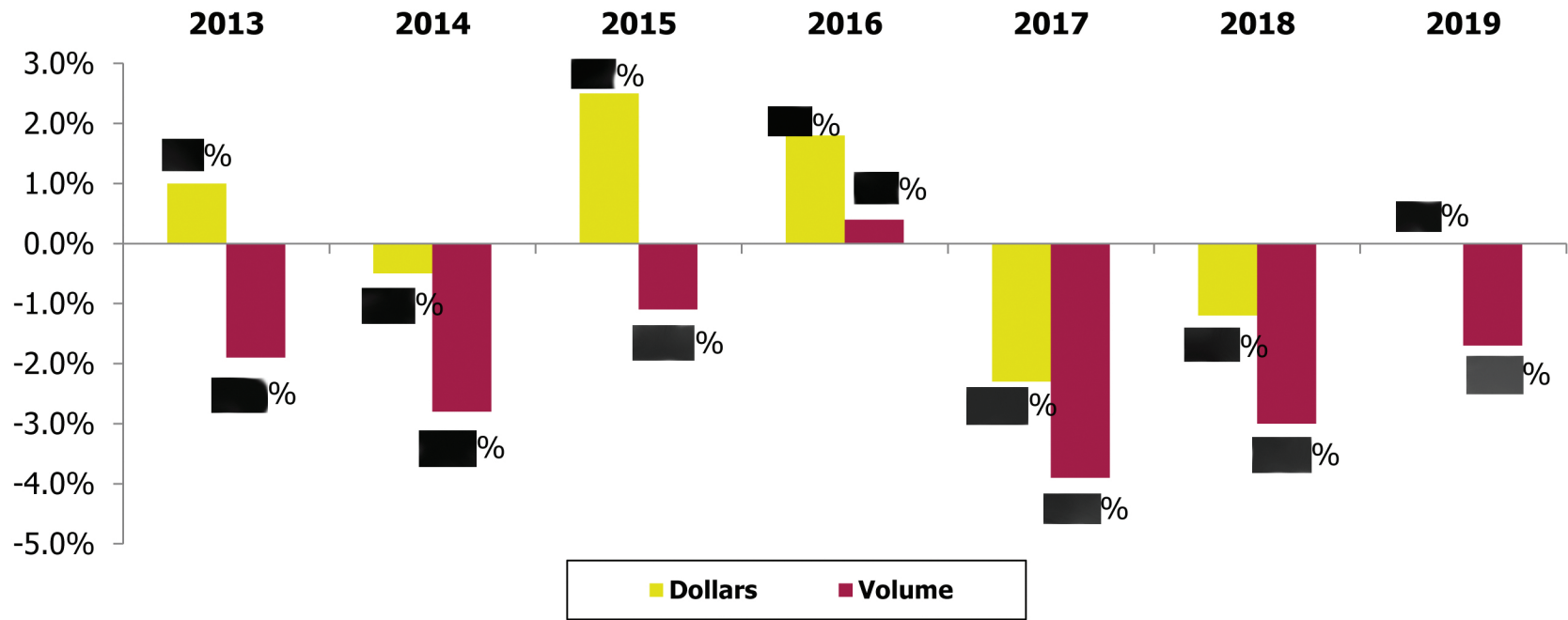
Note: Excludes powdered fruit drink mixes.

Source: Beverage Marketing Corporation

Fruit Beverage Trends

- Fruit beverage volume declined at a compounded annual rate of ███% between 2014 and 2019. Wholesale dollars sales, on the other hand, had a compound annual growth rate (CAGR) of ███% in the same five-year period. This was due to price increases and slight changes in product mix.
- In the five-year period, fruit juice wholesale dollars increased while dollar sales for drinks decreased slightly.

Fruit Beverage Wholesale Dollar and Volume Growth
2013 – 2019



Source: Beverage Marketing Corporation