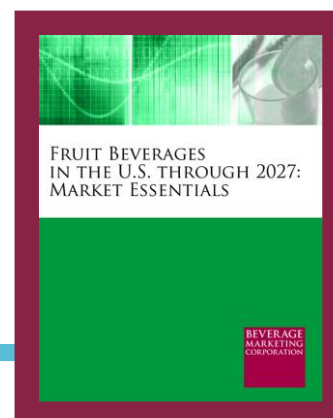


FRUIT BEVERAGES IN THE U.S. THROUGH 2027: MARKET ESSENTIALS

2023 EDITION (Published August 2023. Data through 2022. Market projections through 2027.) 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 fruit beverage trends, this report from Beverage Marketing Corporation 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 and offers other key splits such as flavor by type, distribution channel break-outs, NFC vs. FC, etc. Company and brand data is provided. Five-year U.S. market forecasts are provided for the fruit beverage category and its sub-segments, flavors, packaging, regions, sales channels data and more.

The report presents the data in Excel spreadsheets, which it supplements with an executive summary highlighting key developments and a detailed discussion of the leading fruit beverage companies. Also includes coverage of powdered fruit drinks and the organic fruit beverage markets.

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**HAVE
QUESTIONS?**

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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 2022 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 does this compare to fruit drink consumption?
- How did the various market segments perform in 2022, and how are they like to develop over the next five years?
- 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? How will shelf stable flavor trends differ from chilled?
- Which segment of the market is expected to perform better through 2027 – juices or drinks?
- Which nations ship the most fruit juices to the U.S. and where are the leading destinations for U.S. juice?

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 Tropicana (now majority owned by PAI), PepsiCo, 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, The Wonderful Company and Lassonde Industries and more.
- Company and brand historical and current data includes: **Coca-Cola/Minute Maid brands:** Minute Maid, Simply Orange, Minute Maid Single-Serve, Hi-C, Honest Juice Drinks, Odwalla Bright & Early, Five Alive, Fruitopia, Fuze Juices etc; **PAI Brands:** Tropicana Pure Premium, Tropicana Value/Cold-fill, Naked Juice, Tropicana Chilled Drinks, Trop50, FruitWorks, Dole Chilled, Tropicana and Dole Frozen Concentrate, Tropicana 100% Chilled Juice, Season's Harvest/Citrus Hill, Refresco; **Ocean Spray; Keurig Dr Pepper brands:** Hawaiian Punch (Warehouse), Snapple, Mott's, Hawaiian Punch (DSD), Mystic, Nantucket Nectars, etc; **Kraft brands:** Capri Sun, Kool-Aid, Country Time; **Harvest Hill brands:** Sunny D, Juicy Juice, Veryfine; **Florida's Natural Growers; Welch's; Roll International (POM Wonderful); Bolthouse; Arizona Juice; Apple & Eve/Northland; Martinelli; Calypso; Tree Top; PepsiCo brands:** Twister, Lipton Brisk Juice Drinks, Dole Single-Serve, Lipton Brisk Lemonade, SoBe; **Tampico; Old Orchard and Bug Juice**

- 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 2027.
- Fruit juice and drink volume by flavor and container type through 2027.
- 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 channels and more.



FRUIT BEVERAGES IN THE U.S. THROUGH 2027: MARKET ESSENTIALS

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Fruit Beverages in the U.S. through 2027: Market Essentials

August 2023

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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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Minute Maid has put more emphasis on low-calorie fruit beverages, starting with the Adult Refreshments line and then branching out to chilled multi-serve formats. In the last year or more, it has overhauled its diet offerings — even uprooting longstanding SKUs.

- As noted, it introduced Light Lemonade in March 2002. In November of that year, Coca-Cola added Light Lemonade to restaurant and foodservice spigots, making it the “first diet, non-carbonated postmix fountain drink containing real juice.”
- However, Light Lemonade, along with Light Pink Lemonade (also introduced in 2002), Light Fruit Punch, Light Mango Passion Fruit Drink (introduced in 2013) and Light Watermelon Blueberry (2016 debut) hit the chopping block.
- Several years ago, Minute Maid had already begun a transition of sorts, beefing up its light juice drinks with several multi-serve varieties boasting 15 calories per serving each. These included Just 15 Calories Lemonade (similar in formulation to the 59-ounce carafe of now-defunct Light Lemonade) and Just 15 Calories Fruit Punch, both in 59-ounce cartons.
- Starting in 2019, Minute Maid replaced the aforementioned Light Juice Drinks (Light Lemonade *et al*) and Just 15 varieties with Zero Sugar drinks in four flavors. Zero Sugar Mango Passion, Zero Sugar Pink Lemonade, Zero Sugar Fruit Punch and Zero Sugar Lemonade all come in chilled 52-ounce carafes. Zero Sugar Lemonade also comes in shelf-stable 16.9- and six-packs of 20-ounce PET bottles and 12-packs of 12-ounce cans.
- Light Cherry Limeade debuted in 2018 in six-packs of 16.9- and 20-ounce bottles. It is still sold although only the smaller size remains.

More than a year ago, Minute Maid introduced a new platform.

- Aguas Frescas originally came in 16-ounce cans in Hibiscus, Mango and Strawberry flavors. Aguas frescas have been a difficult market proposition over the years. It supported the launch with various promotions geared towards Generation Z, as well as a cheeky tagline, “Refreshing AF.”
- It has done well enough so far to warrant another flavor (Pineapple Horchata) in 52-ounce carafes. The other three flavors have also added 12-ounce can multi-packs, while Strawberry and Hibiscus are now in the 52-ounce carafes as well.

**U.S. FRUIT BEVERAGE MARKET
SHARE OF VOLUME BY REGION
2017 – 2027(P)**

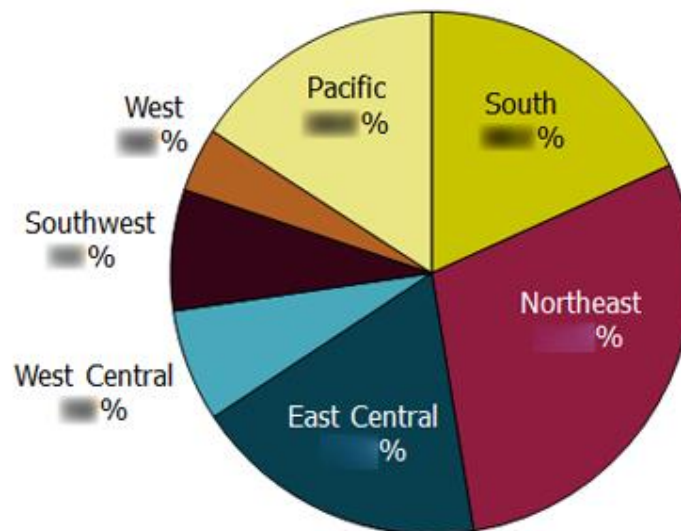
Region	2017	2018	2019	2020	2021	2022	2027(P)
Northeast	15%	15%	15%	15%	15%	15%	15%
East Central	15%	15%	15%	15%	15%	15%	15%
South	15%	15%	15%	15%	15%	15%	15%
Pacific	15%	15%	15%	15%	15%	15%	15%
Southwest	15%	15%	15%	15%	15%	15%	15%
West Central	15%	15%	15%	15%	15%	15%	15%
West	15%	15%	15%	15%	15%	15%	15%
TOTAL	100%	100%	100%	100%	100%	100%	100%

(P) Projected

Note: Excludes powdered fruit drink mixes.

Source: Beverage Marketing Corporation

**Fruit Beverage Regional Volume Shares
2022**



Source: Beverage Marketing Corporation