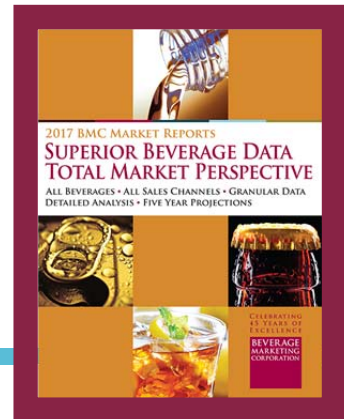


U.S. SINGLE-SERVE FRUIT BEVERAGES THROUGH 2021

2017 EDITION (Published October 2017. Data through 2016. Market projections through 2021.) More than 175 pages, with extensive text analysis, graphs, charts and more than 40 tables.



This industry research report from Beverage Marketing Corporation examines the single-serve fruit beverage market in the United States. It looks at current issues and provides in-depth discussion of the leading companies' distribution and marketing strategies. It also supplies data on volume and sales of their brands. It covers regions, quarterly category growth, packaging (including aseptic and gable-top), and advertising expenditure breakouts for 18 media types and demographics.

FOR A FULL CATALOG OF REPORTS AND DATABASES, GO TO bmcreports.com

AVAILABLE FORMAT & PRICING

↓
Direct
Download

\$3,995

To learn more, to place an advance order or to inquire about additional user licenses **call**: Charlene Harvey +1 212.688.7640 ext. 1962 charvey@beveragemarketing.com

INSIDE:

REPORT OVERVIEW

A brief discussion of key features of this report. 2

TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. 6

SAMPLE TEXT AND INFOGRAPHICS

A few examples of this report's text, data content layout and style. 11



HAVE
QUESTIONS?

Contact Charlene Harvey: 212-688-7640 x 1962
charvey@beveragemarketing.com

BEVERAGE
MARKETING
CORPORATION

BEVERAGE MARKETING CORPORATION
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

THE ANSWERS YOU NEED

In this insightful report, the market for single serve fruit beverages are put in context against a backdrop of the new age beverage market. This provides added perspective on the performance of single serve fruit beverages vs. the beverage options that often share the shelf and compete for consumer trial and loyalty. U.S. Single-Serve Fruit Beverages through 2021 provides in-depth data and market analysis, shedding light on various aspects of the market and the challenges the category faces through reliable data and discussions of what the numbers really mean. Questions answered in the market report include:

- How did the market fare in 2016?
- Which segment of the single-serve fruit beverage market has grown the fastest?
- What is the preferred package type for single-serve fruit beverages?
- What are the top brands in the United States?
- Which distribution channel saw the greatest growth in volume in 2016? Which sales channels will outperform the market in the years through 2021?
- Which segment of the market is expected to grow the fastest to 2021? Which sector is expected to experience a decline in market share?

THIS REPORT FEATURES

The U.S. Single-Serve Fruit Beverages report surveys the landscape of this stalwart beverage category, with volume, retail dollar, wholesale dollar and per capita consumption figures. Get an in-depth look at the leading companies and brands in the single-serve fruit beverages industry and the drivers likely to propel consumption growth through 2021.

All aspects of the market are considered in this industry report, including segmentation by package size and distribution channels. Advertising and demographic data is also considered. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers get a thorough understanding of all facets of the market including:

- Review of the total U.S. fruit beverage market and its juice and drink segments; and overview of the principal New Age segments, including sales and trends in each segment.
- Discussion of developments in the U.S. retail market and overview of the single-serve fruit beverage market in the U.S. using dollar and case sales in terms of per capita consumption.
- Detailed regional data on wholesale dollar sales.
- A comprehensive look at single-serve fruit beverage distribution channel trends.
- Data on packaging and analysis of packaging trends.
- Discussion of key brand sales and the current marketing strategies of the leading companies in the category. Coverage includes Dr. Pepper Snapple, Coca-Cola Company, Kraft Foods, Ocean Spray, PepsiCo, Harvest Hill, POM Wonderful and Welch's.
- Examines and quantifies the super-premium juice market with emphasis on the superfruit sub-category, companies and brands including Sambazon, Zola and Cheribundi.

- A review of ad campaigns and expenditures by media type as well as the demographic profile of consumers.
- Volume of gable-top and aseptic fruit beverages that comprise the larger universe of fruit beverages enjoyed in a single serving.
- Projections of the future of this market segment and a discussion of trends that will drive category growth for the next five years through 2021.

U.S. Single-Serve Fruit Beverages through 2021

October 2017



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

Contents

Table of Contents

TABLE OF CONTENTS

TABLE OF CONTENTS -----	i
DEFINITIONS USED IN THIS REPORT-----	vi
INTRODUCTION -----	xi

Chapter

1. THE U.S. FRUIT BEVERAGE AND NEW AGE MARKETS

The U.S. Fruit Beverage Market -----	1
• Volume -----	1
• Wholesale Dollar Sales -----	3
• Per Capita Consumption-----	4
• Seasonality-----	5
The U.S. New Age Beverage Market -----	6
The 2016 New Age Market-----	10
Exhibits	
1.1 U.S. Fruit Beverage Market Volume and Growth 1980 – 2021 -----	12
1.2 U.S. Fruit Beverage Market Segments Volume 2011 – 2021 -----	13
1.3 U.S. Fruit Beverage Market Segments Share of Volume 2011 – 2021 -----	14
1.4 U.S. Fruit Beverage Market Segments Change in Volume 2012 – 2021 -----	15
1.5 U.S. Fruit Beverage Market Total Wholesale Dollars and Growth 1982 – 2021 -----	16
1.6 U.S. Fruit Beverage Market Segments Estimated Wholesale Dollar Sales 1982 – 2021 -----	17
1.7 U.S. Fruit Beverage Market Segments Share of Wholesale Dollar Sales 1982 – 2021	18
1.8 U.S. Fruit Beverage Market Segments Change in Wholesale Dollar Sales 1991 – 2021 -----	19
1.9 U.S. Fruit Beverage Market Per Capita Consumption 1980 – 2021 -----	20
1.10 U.S. Fruit Beverage Market Segments Per Capita Consumption 1992 – 2021 -----	21
1.11 Fruit Beverage Seasonality Quarterly Volume Shares 2016 -----	22
1.12 U.S. New Age Beverage Market Estimated Wholesale Dollar Sales 1996 – 2021 -----	23
1.13 U.S. New Age Beverage Market Segments Estimated Wholesale Dollar Sales 2011 – 2016 -----	24
1.14 U.S. New Age Beverage Market Segments Share of Wholesale Dollar Sales 2011 – 2016 -----	25
1.15 U.S. New Age Beverage Market Segments Change in Wholesale Dollar Sales 2012 – 2016 -----	26

2. THE U.S. SINGLE-SERVE FRUIT BEVERAGE MARKET

The Single-Serve Fruit Beverage Industry -----	27
• Overview -----	27
• Characteristics and Developments-----	30

TABLE OF CONTENTS

Chapter

2. THE U.S. SINGLE-SERVE FRUIT BEVERAGE MARKET (cont'd)	
The Single-Serve Fruit Beverage Industry (cont'd)	
• Superpremium Juices -----	32
• Sparkling Juice-----	34
Exhibits	
2.16 U.S. Single-Serve Fruit Beverage Market Volume and Growth 1993 – 2021 -----	35
2.17 U.S. Single-Serve Fruit Beverage Market Per Capita Consumption 1993 – 2021 -----	36
2.18 U.S. Single-Serve Fruit Beverage Market Estimated Wholesale Dollars 1993 – 2021	37
2.19 U.S. Single-Serve Fruit Beverage Market Estimated Retail Dollars 2006 – 2021 -----	38
3. REGIONAL SINGLE-SERVE FRUIT BEVERAGE MARKETS	
Regional Single-Serve Fruit Beverage Markets -----	39
• Overview -----	39
• The South -----	40
• The Midwest -----	41
• The West -----	42
• The Northeast-----	42
Exhibits	
3.20 Regional Single-Serve Fruit Beverage Markets Wholesale Dollar Sales 1993 – 2021---	44
3.21 Regional Single-Serve Fruit Beverage Markets Dollar Share 1993 – 2021-----	45
3.22 Regional Single-Serve Fruit Beverage Markets Dollar Growth 1994 – 2021 -----	46
4. SINGLE-SERVE FRUIT BEVERAGE DISTRIBUTION CHANNELS	
Single-Serve Fruit Beverage Distribution Channels -----	47
• Overview -----	47
• Convenience Stores -----	49
• Supermarkets-----	50
• Foodservice -----	50
• Mass Merchandisers -----	51
• Vending -----	51
• Drug Stores -----	51
Exhibits	
4.23 U.S. Single-Serve Fruit Beverage Market Volume by Distribution Channel 2011 – 2021 -----	52
4.24 U.S. Single-Serve Fruit Beverage Market Share by Distribution Channel 2011 – 2021	53
4.25 U.S. Single-Serve Fruit Beverage Market Growth by Distribution Channel 2012 – 2021 -----	54
5. SINGLE-SERVE FRUIT BEVERAGE PACKAGING	
Single-Serve Fruit Beverage Packaging Types-----	55
• Overview -----	55
• Package Sizes-----	58

TABLE OF CONTENTS

Chapter

5. SINGLE-SERVE FRUIT BEVERAGE PACKAGING (cont'd)	
<i>Exhibits</i>	
5.26 U.S. Single-Serve Fruit Beverage Market Case Volume by Package Size and Type 2011 – 2021 -----	60
5.27 U.S. Single-Serve Fruit Beverage Market Case Share by Package Size and Type 2011 – 2021 -----	61
5.28 U.S. Single-Serve Fruit Beverage Market Case Growth by Package Size and Type 2012 – 2021 -----	62
6. THE LEADING SINGLE-SERVE FRUIT BEVERAGE COMPANIES AND THEIR BRANDS	
The Leading Brands -----	63
PepsiCo, Inc.	
• Overview -----	66
• Tropicana — Overview -----	66
• Tropicana — Marketing -----	67
• Dole — Overview -----	70
• Naked Juice — Overview -----	70
• Naked Juice — Marketing -----	73
• Naked Juice — Distribution -----	78
• Izze — Overview -----	79
• Izze — Marketing -----	79
• Izze — Distribution -----	81
• SoBe — Overview -----	81
• SoBe — Marketing -----	82
• SoBe — Distribution -----	84
Coca-Cola Company	
• Overview -----	86
• Minute Maid — Overview -----	86
• Minute Maid — Marketing -----	87
• Minute Maid — Distribution -----	95
• Fuze — Overview -----	96
• Fuze — Marketing -----	96
• Fuze — Distribution -----	98
• Suja — Overview -----	98
Dr Pepper Snapple Group, Inc.	
• Overview -----	101
• Marketing -----	102
• Snapple Beverage Group — Overview -----	104
• Snapple Beverage Group — Marketing -----	105
• Snapple Beverage Group — Distribution -----	109

TABLE OF CONTENTS

Chapter

6. LEADING SINGLE-SERVE FRUIT BEVERAGE COMPANIES AND THEIR BRANDS (cont'd)	
Ocean Spray	
• Overview -----	111
• Marketing -----	112
• Distribution -----	113
Sunny Delight Beverages Company	
• Overview -----	115
• Marketing -----	116
• Distribution -----	120
Welch's	
• Overview -----	121
• Marketing -----	121
• Distribution -----	124
POM Wonderful	
• Overview -----	125
• Marketing -----	126
Exhibits	
6.29 Leading Single-Serve Fruit Beverages Estimated Wholesale Dollar Sales 2011 – 2016 -----	131
6.30 Leading Single-Serve Fruit Beverages Dollar Share 2011 – 2016 -----	132
6.31 Leading Single-Serve Fruit Beverages Dollar Growth 2012 – 2016 -----	133
6.32 Leading Single-Serve Fruit Beverages Estimated Case Volume 2011 – 2016-----	134
6.33 Leading Single-Serve Fruit Beverages Volume Share 2011 – 2016 -----	135
6.34 Leading Single-Serve Fruit Beverages Volume Growth 2012 – 2016-----	136
7. THE SUPERPREMIUM JUICE MARKET	
Superpremium Juice in the U.S.-----	137
Leading Companies -----	143
Exhibits	
7.35 Superpremium Juice Volume and Growth 2000 – 2021 -----	149
7.36 Superpremium Juice Wholesale Dollars and Growth 2000 – 2021-----	150
8. GABLE-TOP AND ASEPTIC FRUIT BEVERAGES	
Single-Serve Gable-Top and Aseptic Beverages -----	151
Exhibits	
8.37 Single-Serve Gable-Top Juice Beverages Estimated Volume, Wholesale Dollars and Growth 2006 – 2021 -----	154
8.38 Single-Serve Aseptic Juice Beverages Estimated Volume, Wholesale Dollars and Growth 2006 – 2021 -----	155

TABLE OF CONTENTS

Chapter

9. SINGLE-SERVE FRUIT BEVERAGE ADVERTISING EXPENDITURES	
Leading Single-Serve Fruit Beverage Advertisers -----	156
Single-Serve Fruit Beverage Advertising by Medium-----	158
<i>Exhibits</i>	
9.39 Leading Single-Serve Fruit Beverage Advertising Expenditures 2011 – 2016 -----	160
9.40 Leading Single-Serve Fruit Beverage Share of Advertising Expenditures 2011 – 2016 -----	161
9.41 Leading Single-Serve Fruit Beverage Change in Advertising Expenditures 2012 – 2016 -----	162
9.42 Single-Serve Fruit Beverage Advertising Expenditures by Media 2011 – 2016 -----	163
9.43 Single-Serve Fruit Beverage Share of Advertising Expenditures by Media 2011 – 2016 -----	164
9.44 Single-Serve Fruit Beverage Change in Advertising Expenditures by Media 2012 – 2016 -----	165
10. DEMOGRAPHICS OF THE SINGLE-SERVE FRUIT BEVERAGE CONSUMER	
The Fruit Drink Consumer -----	166
• Overview -----	166
• Comparative Demographics of Fruit Drink Brands-----	168
<i>Exhibits</i>	
10.45 Demographics of the Fruit Drink Consumer 2016 -----	170
10.46 Demographics of the Hawaiian Punch Consumer 2016-----	172
10.47 Demographics of the Sunny D Consumer 2016-----	174
10.48 Demographics of the Ocean Spray Consumer 2016 -----	176

The single-serve fruit beverage story begins with the introduction of Snapple in 1972, and its subsequent development as an underground sensation. Since then, Snapple has seen a number of powerful competitors enter the market.

- Consolidation and a growing presence of mega beverage companies characterize the fruit beverage market in general and the single-serve fruit beverage segment in particular. All three major carbonated soft drink (CSD) purveyors gained a more substantial single-serve fruit beverage presence in the new millennium.
- In 2000, Snapple itself (along with Mystic) was acquired by Dr Pepper Snapple (DPS) from Triarc Companies. DPS added Nantucket Nectars in 2002.
- In 2001, Coca-Cola acquired fresh packaged juice leader, Odwalla. Also in 2001, Coke debuted shelf-stable, cold-fill Minute Maid Lemonade and Fruit Punch in 20-ounce plastic bottles and 12-ounce cans.
- In 2001, Pepsi acquired SoBe, which joined Tropicana and Dole in its portfolio.
- In 2003, Pepsi and Coke began de-emphasizing brands such as Lipton Brisk Lemonade, FruitWorks and Fruitopia in order to introduce products under their core Tropicana and Minute Maid trademarks — although Pepsi re-introduced fruit drinks under the Lipton Brisk trademark a few years ago.
- As Coke continued to develop Odwalla, Pepsi jumped into the superpremium space with its acquisition of Naked Juice in 2007.
- Pepsi had acquired Izze in 2006 and Coke acquired Fuze in 2007.
- Coke's acquisition of a minority stake in leading high-pressure processing (HPP) brand Suja in 2015 foretold a shift to healthier beverages than even Odwalla — or at least those perceived as such. PepsiCo has countered with a superpremium cold-pressed item under the Naked umbrella.

There have been several interesting plays that make the non-superfruit juice segment worth at least a glance and the contrarian nature of many entrepreneurs has some questioning whether the arena really is devoid of opportunity.

- A few companies are looking to give mainstream lines like Langers and Apple & Eve a run for their money with organic lines sold in single-serve containers, notably San Francisco-based Purity Organic. An investment in summer 2011 by First Beverage Group drew attention to a brand that has largely operated under the radar.

**U.S. SINGLE-SERVE FRUIT BEVERAGE MARKET
SHARE BY DISTRIBUTION CHANNEL
2011 – 2021(P)**

Distribution Channels	2011	2012	2013	2014	2015	2016	2021(P)
OFF-PREMISE							
Convenience Stores	18.5%	19.2%	19.8%	20.5%	21.2%	21.8%	22.5%
Supermarkets	32.1%	31.5%	30.9%	30.3%	29.7%	29.1%	28.5%
Mass Merchandisers	15.3%	15.8%	16.3%	16.8%	17.3%	17.8%	18.3%
Drug Stores	3.2%	3.5%	3.8%	4.1%	4.4%	4.7%	5.0%
All Other*	31.9%	30.0%	28.2%	26.8%	25.4%	24.0%	22.7%
Subtotal	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
ON-PREMISE							
Foodservice	12.5%	13.2%	13.9%	14.6%	15.3%	16.0%	16.7%
Vending	2.1%	2.3%	2.5%	2.7%	2.9%	3.1%	3.3%
All Other**	85.4%	84.5%	83.6%	82.7%	81.8%	80.9%	80.0%
Subtotal	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
TOTAL CHANNELS	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

(P) Projected

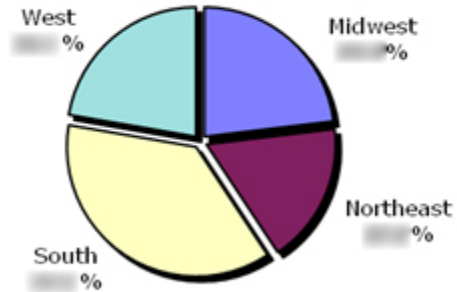
* Includes club stores, dollar stores, health-food stores, "mom & pop" stores, military and online retailers.

** Includes schools, airlines, stadiums, etc.

Note: Mass merchandisers includes Wal-Mart.

Source: Beverage Marketing Corporation

**LARGEST SINGLE-SERVE FRUIT BEVERAGE MARKETS:
THE SOUTH AND THE MIDWEST**
(Share of wholesale dollars by region, 2016)



Source: Beverage Marketing Corporation