

U.S. FRUIT BEVERAGES THROUGH 2019

2014 EDITION (Published June 2015. Data through 2014. Market projections through 2019.) More than 400 pages, with extensive text analysis, graphs, charts and more than 180 tables



This report delivers the details on juices, juice blends, refrigerated, shelf stable, concentrates, organic, trends by brand, flavors, packaging and much more. Provides topline global data as well as projections for the U.S. market. Also breaks out nectars and superpremium juice as well as from-concentrate and not-from-concentrate juice. Looks at key industry issues and discusses emerging sub-sectors such as light/low-calorie juices and drinks. Contains five-year projections.

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HAVE
QUESTIONS?

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THE ANSWERS YOU NEED

In *U.S. Fruit Beverages through 2019*, Beverage Marketing Corporation presents in-depth data and market analysis, shedding light on industry trends and providing insight and perspective on what the numbers really mean. This year's edition of this comprehensive market research report includes five year forecasts on a broader range of topics than ever, making it an even better tool for spotting trends and opportunities and determining where to focus future efforts for maximum success. Questions answered include:

- Which fruit beverage companies and brands in the United States experienced growth in 2014, and which did not?
- How do past, current and future shelf stable trends stack up vs. chilled fruit beverage trends?
- 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 the various fruit beverage market segments perform in 2014, and how are they like to develop over the next five years?
- How do from concentrate trends (FC) differ from not-from-concentrate (NFC) trends and what will each market look like in 2019?
- 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 the various flavors shift over the next five years?
- Which segment of the fruit beverage market is expected to perform better through 2019 - juices or drinks?

THIS REPORT FEATURES

U.S. Fruit Beverages through 2019 surveys the landscape of this stalwart beverage category, with volume, retail dollar, wholesale dollar and per capita consumption figures. In this report Beverage Marketing Corporation provides an in-depth look at the leading companies and brands in the category and the drivers likely to propel consumption growth through 2019. All aspects of the fruit beverage market are considered, including segmentation by package size, distribution channels, flavor and processing method. Powdered and organic fruit beverages are also considered along with advertising and demographic data. Backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, users get a thorough understanding of all facets of the fruit beverage market including:

- Historical and current statistics and BMC's exclusive projections on on multiple facets of the fruit beverages market, as well as insight into current trends and market drivers
- A Regional look at the U.S. fruit beverage marketplace, with past, current and future volume and growth of fruit juice and fruit drinks broken out for ready comparison
- 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, Dr Pepper Snapple, Florida's Natural Growers, Welch's, Nestlé USA, Sunny Delight Beverages, Kraft Foods, Tree Top and Apple & Eve

- Data and discussions detailing trends in shelf-stable, from-concentrate and not-from-concentrate juices, frozen concentrate and chilled, ready-to-serve fruit beverages, nectars and superpremium juice through 2019
- An analysis of fruit juice and drink volume by flavor and container type through 2019
- Statistics of imported and exported fruit juices by flavor and country of origin and country of destination
- Advertising expenditures of the leading fruit beverage companies and a look at category spending by media type(including internet advertising)
- Consumer demographic profiles comparing consumers of key fruit beverage brands
- An overview of the powdered and organic fruit beverages segments and the key players
- More five-year projections than ever for the fruit beverage market including sub-segments, flavor trends, packaging , regional trends, expectations by sales channel and more.

U.S. Fruit Beverages through 2019

June 2015



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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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 six years, although sales have gone sideways in the past three years. Reb A also found its way into Coca-Cola's Odwalla superpremium juice brand. PepsiCo has also snuck it into several SoBe flavors.
- Honest Tea, which has been fully in the Coke fold since February 2011, has several products laced with stevia. Honest Zero Calorie Passion Fruit Green Tea and Honest Zero Calorie Lemonade are sweetened with organic stevia extract.
- Monster Beverage Corporation's Hubert's brand (Lemonade and half & half) is sweetened with cane sugar and stevia extract.
- In April 2011, Old Orchard introduced Cranberry Naturals, a 64-ounce PET line made with natural sugar (aside from the sugar in the juice) and Truvia.
- Florida's Natural released a product similar to Trop50. The Fit & Delicious line is sweetened with stevia leaf extract and contains 60 calories per serving. It comes in three Valencia orange varieties.
- The approval of Reb A was viewed mostly as a possible boon for CSDs, given the category's massive size. This has not panned out and thus it would be hasty to suggest that stevia would be the fruit beverage category's savior. However, stevia may play a modest role in reengaging lapsed drinkers given that people generally believe fruit beverages are healthy and would drink more of them if they weren't so high in calories.
- Another gambit to reduce calories is to just water down the juices themselves. This has been the tactic employed by Nestlé with Juicy Juice Fruitfuls and Apple & Eve with FruitSmarts. (The latter has been discontinued.)

**FRUIT JUICE
SHARE OF VOLUME BY FLAVOR
2013 – 2019(P)**

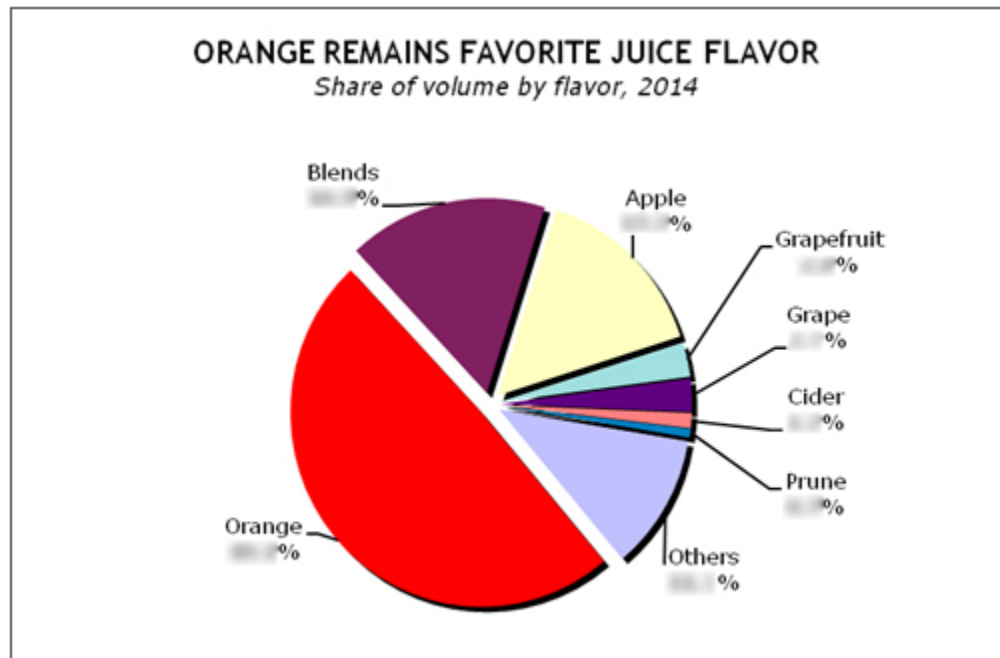
Flavor	Frozen Concentrate			Chilled, Ready-to-Serve			Shelf Stable			Total Juice		
	2013	2014	2019(P)	2013	2014	2019(P)	2013	2014	2019(P)	2013	2014	2019(P)
Orange	35%	35%	35%	25%	25%	25%	15%	15%	15%	25%	25%	25%
Blends	15%	15%	15%	10%	10%	10%	5%	5%	5%	10%	10%	10%
Apple	10%	10%	10%	5%	5%	5%	5%	5%	5%	10%	10%	10%
Grapefruit	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
Grape	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
Cider	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
Prune	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
Others	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

(P) Projected

Note: Except for orange, apple, blends and grapefruit gallonage, all other flavor totals are underestimated because some flavor gallonage is included in the "others" category.

N/A Not available

Source: Beverage Marketing Corporation; U.S. Department of Commerce



Source: Beverage Marketing Corporation