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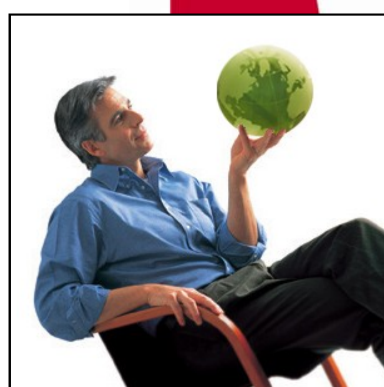
**International Markets Bureau**

MARKET INDICATOR REPORT | DECEMBER 2011

# Fruit Juices

## in the United States



## CONSUMER TRENDS

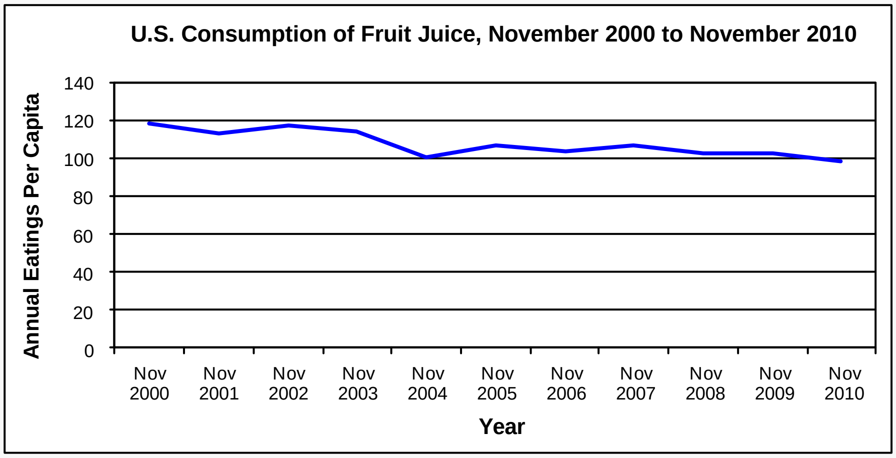
- In 2010, the fruit/vegetable juice retail market in the United States (U.S.) was valued at US$16.2 billion. The most popular fruit/vegetable juice category was 100% juice, with US$8.8 billion in retail sales.
- On a per-capita basis, Americans consumed US$52.50 worth of fruit/vegetable juice in 2010. This amounts to around 30.3 litres per person.
- The fruit/vegetable juice retail market has been rather sluggish in value terms, at a compound annual growth rate (CAGR) of 2.4% from 2005 to 2010. The market is expected to remain at a growth rate of 2.4% CAGR from 2011 to 2014. Volume growth of this market showed a decline from 2005 to 2010, with a CAGR of -2.1%, and is expected to decline further, with a CAGR of -0.2% from 2011-2015.
- From 2005 to 2010, the only fruit/vegetable juice sub-sector that grew in volume terms was nectars (25-99% juice), with a CAGR of 0.9%.
- Growth in the health and wellness fruit/vegetable juice category is very different than the regular fruit/vegetable juice market. Retail sales of reduced sugar fruit/vegetable juice have grown at a CAGR of 15% from 2005 to 2010, however, organic fruit/vegetable juice retail sales have shrunk, with a CAGR of -4.6% over the same period. Positive retail sales growth is expected for all health and wellness fruit/vegetable juice categories from 2011 to 2015.
- Consumers have become more health conscious, especially regarding juices that are high in added sugars. Stevia, a natural sweetener added to nectars and juice drinks (up to 24% juice), has become very popular.
- Private label fruit/vegetable juices slightly increased their total sales from 2005 to 2010, and now account for 21% of total fruit/vegetable juice sales by volume. When analyzing new product introductions in the U.S. market from January 2011 to September 2011, within the 100% juice, nectar and juice drinks market, 22.4% of product launches were private label.
- Claims regarding kosher, no additives/preservatives and low/no/reduced sugar are all very popular product characteristics in this developed market.
- Fruit/vegetable juices are mostly sold in hypermarkets and supermarkets. Grocery retailers in the U.S. with the highest retail sales include: Wal-Mart, Kroger, Costco, Safeway and SuperValu.

## INSIDE THIS ISSUE



## CONSUMPTION DEMOGRAPHICS

- According to the NPD Group's National Eating Trends database (2011)[1], per capita consumption of fruit juice in the U.S. has decreased by almost 17% over the past ten years. Fruit juice is consumed an average of 98 times per year per capita, or almost twice in a two-week period.




### *Core Markets*

*(at least 20% above average consumption rate)*

- Low income households (earnings under $10,000 per year)
- Younger (under 25 years of age) or older homemakers[2] (65 years and older)
- Single-parent households
- Households with children, particularly those under 6 years of age
- Larger households (5+ members)
- Single or married active seniors, especially those aged 75 and older
- Non-white ethnic groups
- Residents of the New England states (Vermont, New Hampshire, Maine, Maryland, Rhode Island, and Connecticut)

### *Underdeveloped Markets*

*(at least 20% below average consumption rate)*

- Households with an annual income of US$20,000 to US$39,999
- Low- or middle-income empty nesters
- Dual-member households
- Dual-income couples without children
- Adults aged 35-54 years, particularly males
- Females on a diet by individual choice
- Residents of the Mountain region (Montana, Idaho, Wyoming, Nevada, Utah, Colorado, Arizona, and New Mexico)
- Residents of the West South Central region (Oklahoma, Texas, Arkansas and Louisiana)

### *Consumption Locale*

- Most fruit juice eatings take place during a meal (93%), while 7% are consumed as a snack.
- Of the reported fruit juice eatings, 72.4% took place in the morning, 13.9% in the afternoon and 13.4% in the evening.
- Similarly, breakfast accounts for 70.5% of eatings, followed by lunch (11.8%) and dinner (10.6%).

### *Consumption Calendar*

- Fruit juice is consumed fairly evenly throughout the week. However, a slightly higher percentage of eatings is reported on Mondays.
- Eatings are also almost equally divided among the seasons, with slightly higher consumption in the spring (25.8%) and fall (25.3%). Fruit juice is also consumed on special occasions or when guests are present.

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[1]*Unless otherwise stated, all of the statistics on this page were derived from the NPD Group's National Eating Trends database, updated to November 2010, and reflect the consumption of products at home, or products carried away from home. These figures do not reflect purchases of food products made through foodservice establishments, or the consumption thereof. NPD monitors the eating habits and attitudes of American consumers by surveying 5000 individuals reporting on 14-day's continuous consumption of all meals and snacks.*

[2]*Defined by NPD as the head of the household or the primary food shopper, which is typically the female.*

## RETAIL SALES

- In 2010, sales of fruit and vegetable juice reached US$16.2 billion in the U.S.

- The fruit/vegetable juice category includes frozen juices, but does not include carbonated juices. Juice drinks with a high amount of milk ingredients are excluded, as well as fruit shakes. In 2010, 75% of all fruit/vegetable juices sold were ambient (shelf-stable), while chilled juices held the remaining 25% of the market. Chilled juices are expected to increase their share of overall fruit/vegetable juice sales. The 100% juice market has suffered in the past five years due to a decline in the reconstituted 100% juice market, as these products are seen as less healthy than not-from-concentrate 100% juice.

**Retail Market Sizes of Fruit/Vegetable Juice in the United States**
**Retail Value in US$ millions - Current Prices**

| Juice Categories | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| **100% Juice** | **9,014.2** | **8,811.2** | **9,205.5** | **9,283.0** | **9,108.7** | **8,782.3** |
| Frozen 100% Juice | 387.2 | 363.2 | 386.1 | 390.2 | 386.3 | 374.1 |
| Not from Concentrate 100% Juice | 3,040.2 | 3,069.4 | 3,290.2 | 3,403.8 | 3,310.2 | 3,245.0 |
| Reconstituted 100% Juice | 5,586.7 | 5,378.6 | 5,529.2 | 5,489.1 | 5,412.2 | 5,163.3 |
| **Juice Drinks (up to 24% Juice)** | **5,295.8** | **5,182.0** | **5,273.6** | **5,310.8** | **5,304.0** | **5,373.1** |
| Frozen Juice Drinks | 228.6 | 195.5 | 192.2 | 184.7 | 171.4 | 166.1 |
| Juice Drinks-Excluding Asian Drinks | 5,067.2 | 4,986.4 | 5,081.4 | 5,126.1 | 5,132.6 | 5,207.0 |
| **Fruit-Flavoured Drinks (No Juice Content)** | **275.8** | **265.1** | **279.0** | **326.4** | **336.0** | **349.9** |
| **Nectars (25-99% Juice)** | **1,488.3** | **1,535.7** | **1,602.3** | **1,610.2** | **1,663.4** | **1,710.3** |
| Frozen Nectars | 25.9 | 24.2 | 25.5 | 26.3 | 25.5 | 25.9 |
| Unfrozen Nectars | 1,462.4 | 1,511.5 | 1,576.8 | 1,583.9 | 1,637.9 | 1,684.4 |
| **Total Fruit/Vegetable Juice** | **16,074.1** | **15,793.9** | **16,360.4** | **16,530.4** | **16,412.1** | **16,215.6** |

***Source:*** *Euromonitor, 2011*

## HEALTH AND WELLNESS

- The retail value of the health and wellness fruit/vegetable juice market, represents approximately 26% of the total fruit/vegetable juice market in the U.S. Fortified and functional fruit/vegetable juices are the most popular juice products in the health and wellness category. However, reduced-sugar juices have, and are expected to, achieve the highest growth rates in both volume and value retail sales. Organic and fortified functional claims are most popular among 100% juices, while reduced sugar is only used for nectars and juice drinks.

**Retail Market Sizes of Health and Wellness Fruit/Vegetable Juice in the United States**
**Retail Value in US$ millions - Current Prices**

| Juice Categories | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| FF* Fruit/Vegetable Juice | 3,452.9 | 3,423.6 | 3,502.7 | 3,517.8 | 3,529.4 | 3,499.0 |
| Organic Fruit/Vegetable Juice | 417.2 | 434.5 | 444.3 | 343.0 | 323.1 | 329.9 |
| Reduced Sugar Fruit/Vegetable Juice | 168.4 | 193.7 | 219.8 | 243.7 | 303.3 | 337.9 |
| **Total Health and Wellness Juice** | **4,038.5** | **4,051.8** | **4,166.8** | **4,104.5** | **4,155.8** | **4,166.8** |

***Source:*** *Euromonitor, 2011.* ****Note:*** *FF = fortified functional*

## LEADING FLAVOURS

- The most popular flavour for the American 100% juice market is orange, with almost 60% of the retail volume market share in 2010. Mixed fruits are gaining in popularity in the 100% juice category as well. Mixed fruits are the most popular flavour for the nectar market, holding almost 40%. Finally, orange is also the most popular flavour for the juice drinks market, with 22.7% in 2010.

**Leading Flavours for 100% Juice in the United States: % Volume Breakdown**

| Flavours | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Apple | 13.0 | 12.8 | 12.6 | 12.5 | 12.5 | 12.3 |
| Cranberry | 2.4 | 2.5 | 2.9 | 3 | 3.1 | 3.2 |
| Grape | 4.0 | 4.0 | 3.9 | 3.9 | 3.8 | 3.8 |
| Grapefruit | 2.6 | 2.3 | 2.2 | 2.1 | 2.0 | 2.0 |
| Lemon | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 |
| Mixed fruits | 7.5 | 7.8 | 8.6 | 9.2 | 9.3 | 9.6 |
| Orange | 60.3 | 60.3 | 59.8 | 59.6 | 59.7 | 59.9 |
| Prune | 1.6 | 1.6 | 1.7 | 1.8 | 1.7 | 1.6 |
| Tomato | 3.3 | 3.9 | 4.0 | 4.3 | 4.3 | 4.4 |
| Other flavours | 5 | 4.5 | 4.0 | 3.3 | 3.3 | 3.0 |

**Leading Flavours for Nectars (25-99% Juice) in the United States: % Volume Breakdown**

| Flavours | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Apricot | 15.6 | 15.8 | 15.9 | 15.8 | 15.8 | 14.5 |
| Cranberry | 12.8 | 12.7 | 13 | 13 | 13.1 | 13.1 |
| Grapefruit | 1.8 | 1.5 | 1.3 | 1.1 | 1.1 | 1.2 |
| Mango | 11.2 | 11.6 | 12.0 | 12.2 | 12.3 | 12.0 |
| Mixed fruits | 37.5 | 37.9 | 39.2 | 39.5 | 39.5 | 39.4 |
| Orange | - | - | - | - | 1.4 | 4.2 |
| Peach | 10.3 | 10.3 | 10.4 | 10.4 | 10.4 | 9.5 |
| Strawberry | 3.3 | 3.5 | 3.5 | 3.5 | 3.5 | 3.6 |
| Other flavours | 7.5 | 6.7 | 4.7 | 4.5 | 3.0 | 2.5 |

**Leading Flavours for Juice Drinks (up to 24% Juice) in the United States: % Volume Breakdown**

| Flavours | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Berry | 9.9 | 10.2 | 10.5 | 10.8 | 10.9 | 10.8 |
| Cranberry | 6.3 | 6 | 6.4 | 6.4 | 6.5 | 6.3 |
| Fruit punch | 8.2 | 8.5 | 9.0 | 9.2 | 9.4 | 9.5 |
| Grape | 4.7 | 5.1 | 5.0 | 4.8 | 4.7 | 4.5 |
| Grapefruit | 1.3 | 1.1 | 1.0 | 0.9 | 0.9 | 0.9 |
| Lemon | 11.5 | 11.3 | 11.1 | 10.8 | 10.7 | 11.3 |
| Mixed fruits | 14.5 | 14.9 | 15.8 | 16.4 | 16.6 | 16.7 |
| Orange | 23.5 | 23.5 | 23 | 22.7 | 22.5 | 22.7 |
| Strawberry | 3.9 | 4.0 | 4.2 | 4.2 | 4.1 | 4.0 |
| Other flavours | 16.2 | 15.4 | 14 | 13.8 | 13.7 | 13.4 |

***Source for all tables:*** *Euromonitor, 2011*

## BRAND AND COMPANY SHARES

- Tropicana is the market leader for all fruit/vegetable juices in the U.S., holding 10% of the market in 2010. However, the fruit juice market is not very concentrated, with many small producers and private label producers in the market.

**Top 15 Brand Shares (by Global Brand Name) of Fruit/Vegetable Juices in the United States**
**Retail Value - % Breakdown**

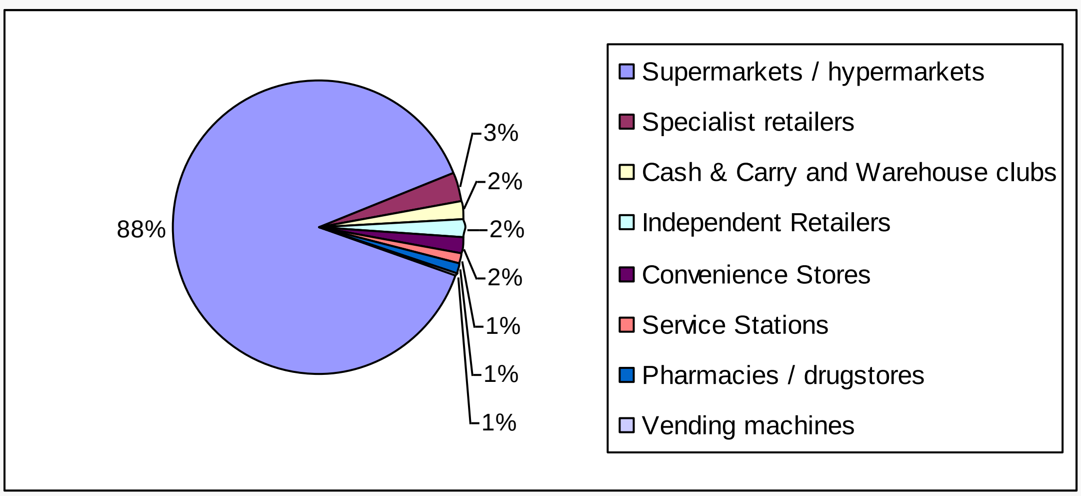
| Brand | Company | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|
| Tropicana | Tropicana Products Inc | 12.6 | 12.0 | 10.9 | 10.0 |
| Minute Maid | Coca-Cola Co, The | 9.0 | 8.8 | 8.8 | 8.4 |
| Capri-Sun | Kraft Foods Inc | 7.4 | 7.3 | 7.4 | 7.8 |
| Simply | Coca-Cola Co, The | 3.5 | 4.5 | 5.2 | 6.5 |
| Other Private Label | Other Private Label | 6.0 | 5.9 | 6.4 | 6.4 |
| Ocean Spray | Ocean Spray Cranberries Inc | 5.4 | 5.5 | 5.3 | 5.5 |
| V8 | Campbell Soup Co | 3.1 | 3.3 | 3.7 | 3.6 |
| Florida's Natural | Florida's Natural Growers | 3.1 | 3.0 | 3.0 | 3.0 |
| SoBe | PepsiCo Inc | 3.5 | 3.3 | 3.2 | 2.9 |
| Walmart | Wal-Mart Stores Inc | 2.4 | 2.5 | 2.5 | 2.6 |

***Source:*** *Euromonitor, 2011*

## DISTRIBUTION CHANNELS

- According to Datamonitor, in 2009, 88% of retail purchases of fruit/vegetable juice in the United States, were through supermarkets or hypermarkets.

**Retail Distribution Shares of Fruit/Vegetable Juices in the United States**
**Retail Volume % in 2009**




***Source:*** *Datamonitor, 2010*

## NEW PRODUCTS

- The following are three examples of new fruit juice products entering the U.S. market within the past year, from Mintel Global New Products Database (2011). This section does not include frozen juice or other juice concentrates.


**Cranberry Juice Cocktail from Concentrate**
Company: Giant Eagle (Private Label)
Price: US$4.38
Pack Size: 2.84 L


**100% Juice Smoothie**
Company: Naked Juice
Price: US$5.99
Pack Size: 1.89L


**Naturally Cranberry Juice**
Company: Apple and Eve
Price: US$3.59
Pack Size: 1.4L

- There were a total of 174 new fruit/vegetable juice and nectar products entering the U.S. market from January 2011 to September 2011. Old Orchards Cranberry Naturals brand, along with the Naked brand introduced the most number of new product varieties over the period.

**Top Brands for New Fruit/Vegetable Juice and Nectar Product Introductions in the United States - January to September 2011**

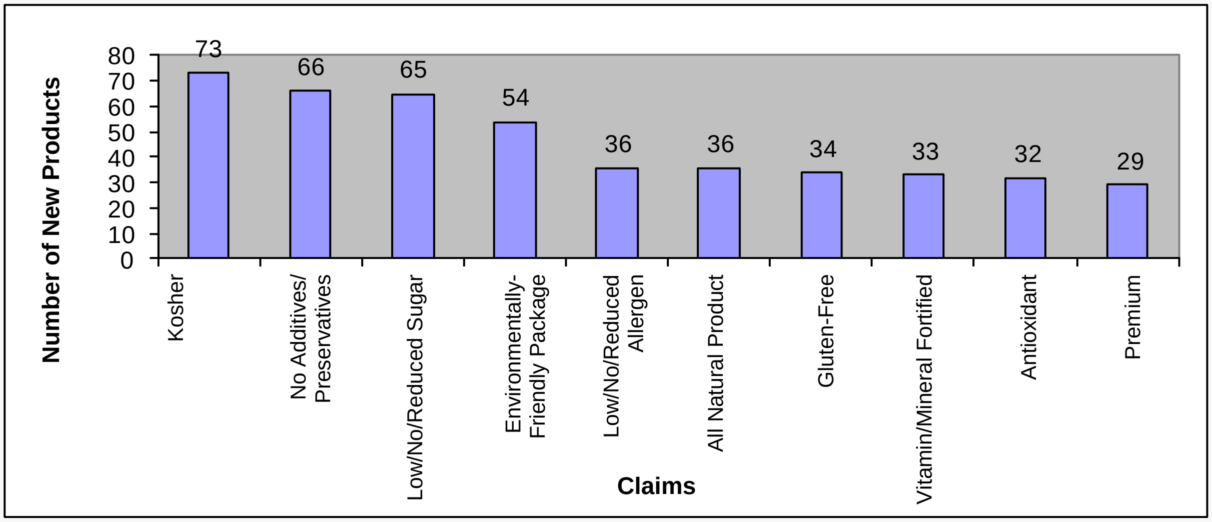
| Top 10 Brands | Number of New Products |
|---|---|
| Old Orchards Cranberry Naturals | 6 |
| Naked | 6 |
| Tropicana Pure Premium | 5 |
| Nature's Nectar | 4 |
| McMahon's Farm | 4 |
| BluePrintJuice | 4 |
| Trader Joe's | 4 |
| Bossa Nova | 4 |
| Langers | 4 |
| HyVee | 4 |
| **Total Sample** | **174** |

***Source:*** *Euromonitor, 2011*
***Note****: Data includes 100% juice, nectars and some juice drinks*

- From January 2011 to September 2011, the "kosher" claim was the most popular for fruit/vegetable juices and nectars in the U.S, followed by "no additives/preservatives," and "low/no/reduced sugar."

- Polyethylene terephthalate, or PET plastic, is the most popular packaging material used for fruit/vegetable juices and nectars. It was used for around 40% of products, while 20% were made with multi-layer board, and 13% were high-density polyethylene (HDPE) plastic. Only 8% were glass.

**New Fruit/Vegetable Juice and Nectar Product Introductions in the United States January 2011 to July 2011 – By Top 10 Claims**




***Source:*** *Euromonitor, 2011.* ***Note****: Data includes 100% juice, nectars and some juice drinks*

## TRADE DATA

- In 2010, the U.S. imported over US$1.4 billion worth of fruit and vegetable juices from the world. Canada's share of this market accounted for US$43.9 million, or 3%. Of the imports from Canada, US$10.4 million was apple juice, US$8.9 million was cranberry juice, US$5.6 million was grape juice, US$5.4 million was fruit mixture, and US$2.6 million was blueberry juice. Canada's only competitor for cranberry imports is Chile, while there are no competitors for blueberry juice. Competitors for apple juice include China and Mexico.

**United States Import Statistics (Top 10 Markets)**
**Commodity 2009: Fruit (including grape) & Vegetable Juices, Unfermented, Not Containing Spirits, Whether or Not Sweetened**

| Partner Country | US$ | | | % Share | | |
|---|---|---|---|---|---|---|
| | 2008 | 2009 | 2010 | 2008 | 2009 | 2010 |
| **World** | **1,951,829,074** | **1,423,099,375** | **1,449,139,973** | **100.00** | **100.00** | **100.00** |
| China | 675,381,290 | 356,943,787 | 385,519,097 | 34.60 | 25.08 | 26.60 |
| Brazil | 331,344,029 | 304,231,688 | 321,235,462 | 16.98 | 21.38 | 22.17 |
| Mexico | 205,922,885 | 172,674,581 | 199,834,401 | 10.55 | 12.13 | 13.79 |
| Argentina | 216,793,981 | 141,531,292 | 118,868,501 | 11.11 | 9.95 | 8.20 |
| Costa Rica | 48,154,665 | 49,964,333 | 56,232,671 | 2.47 | 3.51 | 3.88 |
| Chile | 104,123,174 | 85,947,119 | 54,572,920 | 5.33 | 6.04 | 3.77 |
| Philippines | 45,624,346 | 58,208,043 | 52,913,764 | 2.34 | 4.09 | 3.65 |
| Canada | 60,361,870 | 49,102,535 | 43,877,890 | 3.09 | 3.45 | 3.03 |
| Thailand | 36,543,000 | 41,786,481 | 35,412,196 | 1.87 | 2.94 | 2.44 |
| Turkey | 41,529,725 | 25,088,023 | 22,219,593 | 2.13 | 1.76 | 1.53 |

***Source:*** *Global Trade Atlas, 2011*

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