

Fruit Juice, Juice Drinks and Smoothies - UK - November 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Concerns around sugar are affecting the fruit juice, juice drinks and smoothies market. 36% of those buying less/ not buying do so because of concerns over sugar content. Boding well for NPD is that 40% are interested in variants with reduced sugar and no sweeteners, and 24% in reduced sugar with plant-derived sweeteners such as stevia.”
 – Amy Price, Senior Food and Drink Analyst

This report looks at the following areas:

- NPD looks to tackle consumer concerns on sugar
- Added value drinks such as vegetable blends and cold-pressed juice can boost the market
- Catering to the children’s market could prove lucrative for the future

Estimated at £4.7 billion, total fruit juice, juice drinks and smoothies grew by 3.3% over 2010-15, although volumes saw a 13% decline over this period, to stand at 1.8 billion litres. Average prices have been rising over the past five years, at the expense of volumes.

78% of UK adults drink 100% fruit juice, juice drinks or smoothies, demonstrating their popularity as a household staple. 100% fruit juice is the most popular, with 49% of adults drinking it once a week or more and accounting for around 60% of value and volume sales.

The dangers of excessive sugar in diets attracted prolonged negative media coverage in 2014 and into 2015, which has had a negative impact on sales of fruit juice and to a lesser extent, smoothies. NPD is, however, looking to counter this through innovation on low/no/reduced sugar variants and those containing alternative sweeteners such as the plant-derived stevia.

Elsewhere, premiumisation in cold-pressed formats and vegetable blends is helping to add value to the market, and should help the market to capitalise on the predicted rise in consumer incomes in 2015, which is expected to continue over 2015-20.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Fruit Juice, Juice Drinks and Smoothies - UK - November 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Covered in this report

Executive Summary

The market

Sales continue to fall

Figure 1: Forecast of UK sales of fruit juice, juice drinks and smoothies, by value, 2010-20

Slight value growth predicted over 2015-20

Fruit juice struggling, juice drinks in better health

Sugar attracts negative attention

Rising incomes should help to support sales

Companies and brands

Fruit juice brands see sales fall in line with segment

Juice drink leader Ribena sees sales fall, in contrast to category growth

Smoothie leader Innocent dominates adspend

Increase in low/no/reduced sugar variants in 2015 following media attention

Innocent stands out as a brand

The consumer

Fruit juice is drunk by almost three in four UK adults

Figure 2: Usage of fruit juice, juice drinks and smoothies, by frequency, September 2015

Fruit juice is seen as better for you by nearly three in four

Figure 3: Attitudes towards fruit juice, juice drinks and smoothies, September 2015

Steps to reduce sugar top enticements

Figure 4: Interest in selected fruit juice, juice drinks and smoothies enticements, September 2015

Sugar is top reason for cutting back/not buying fruit juice/smoothies

Figure 5: Reasons for buying less or not buying fruit juice/smoothies, September 2015

What we think

Issues and Insights

NPD looks to tackle consumer concerns on sugar

The facts

The implications

Added value drinks such as vegetable blends and cold-pressed juice can boost the market

The facts

The implications

Catering to the children's market could prove lucrative for the future

The facts

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Fruit Juice, Juice Drinks and Smoothies - UK - November 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The implications

The Market – What You Need to Know

- Sales continue to fall
- Slight value growth predicted over 2015-20
- Fruit juice struggling, juice drinks in better health
- Sugar attracts negative attention
- Rising incomes should help to support sales

Market Size and Forecast

Market continues to suffer in the wake of sugar scare
 Figure 6: UK value and volume sales of fruit juice, juice drinks and smoothies, 2010-20

Forecast

- Figure 7: Forecast of UK sales of fruit juice, juice drinks and smoothies, by value, 2010-20
- Figure 8: Forecast of UK sales of fruit juice, juice drinks and smoothies, by volume, 2010-20

Segment Performance

Fruit juice sees ongoing decline
 Figure 9: UK value and volume sales fruit juice, 2010-20
 Figure 10: Forecast of UK sales of fruit juice, by value, 2010-20

Juice drinks see continued growth
 Figure 11: UK value and volume sales of juice drinks, 2010-20
 Figure 12: Forecast of UK sales of juice drinks, by value, 2010-20

Rising prices prop up smoothie sales
 Figure 13: UK value and volume sales of smoothies, 2010-20
 Figure 14: Forecast of UK sales of smoothies, by value, 2010-20

Market Drivers

Sugar debate continues to impact the market
 Ongoing opportunity for the category to push fruit/veg content
 Figure 15: Agreement with the statement 'I eat 5 portions of fruit/vegetables every day', March 2012-August 2015

Rising incomes should benefit the market
 Figure 16: Trends in consumers' current financial situation compared to a year ago, net of "better off" and "worse off", July 2011-Sept 2015

The rise in number of children should provide a boost

Key Players – What You Need to Know

- Fruit juice brands see sales fall in line with segment
- Juice drink leader Ribena sees sales fall, in contrast to category growth
- Smoothie leader Innocent dominates adspend
- Increase in low/no/reduced sugar variants in 2015 following media attention
- Innocent stands out as a brand

Market Share

BUY THIS
REPORT NOW

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
 EMAIL: reports@mintel.com

Fruit Juice, Juice Drinks and Smoothies - UK - November 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Fruit juice brands see sales fall in struggling segment

Figure 17: UK retail sales of leading brands in the fruit juice market, by value and volume, 2013/14 and 2014/15

Figure 18: UK retail sales of leading manufacturers in the fruit juice market, by value and volume, 2013/14 and 2014/15

Juice drink leader Ribena sees sales fall, in contrast to category growth

Figure 19: UK retail sales of leading brands in the juice drinks market, by value and volume, 2013/14 and 2014/15

Figure 20: UK retail sales of leading manufacturers in the juice drinks market, by value and volume, 2013/14 and 2014/15

Innocent dominates smoothies, despite sales fall

Figure 21: UK retail sales of leading brands in the smoothies market, by value and volume, 2013/14 and 2014/15

Launch Activity and Innovation

Fruit juice, juice drinks and smoothies lead soft drinks innovation in 2015

Figure 22: New product launches in the UK soft drinks market, by category, 2011-15

Increase in low/no/reduced sugar variants in 2015 following media attention

Figure 23: New product launches in the UK fruit juice, juice drinks and smoothies market, with a low/no/reduced sugar claim, 2011-15

Stevia provides a way to reduce sugar and calorie content

Vegetable blends offer a health halo

Figure 24: New product launches in the UK fruit juice, juice drinks and smoothies market containing vegetables listed as an ingredient, 2011-15

Juice drinks continue to explore fortification

Cold-pressed continues to be referenced

Figure 25: New product launches in the UK fruit juice, juice drinks and smoothies market that are described as 'cold-pressed' on-pack, 2011-15

Smoothies look to use coconut milk as an ingredient

Brand Communication and Promotion

Advertisers continue to cut back

Figure 26: Total above-the-line advertising expenditure in the UK fruit juice, juice drinks and smoothies market, 2012-15

Innocent leads on spend

Suntory steps up support for Ribena

Oasis hopes to attract the teen market with honesty

Figure 27: Total above-the-line advertising expenditure in the UK fruit juice, juice drinks and smoothies market, by top 10 advertisers (sorted by 2014), 2012-15

Nielsen Media Research coverage

Brand Research – Fruit Juice, Juice Drinks and Smoothies

What you need to know

Brand map

Figure 28: Attitudes towards and usage of selected drink brands, September 2015

Key brand metrics

Figure 29: Key metrics for selected drink brands, September 2015

Brand attitudes: Youthful brands associated with value

Figure 30: Attitudes, by drink brand, September 2015

Brand personality: Innocent's product and price earn a more exclusive image

Figure 31: Brand personality – Macro image, September 2015

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Fruit Juice, Juice Drinks and Smoothies - UK - November 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Tropicana has advantage on taste, Ribena on heritage

Figure 32: Brand personality – Micro image, September 2015

Brand analysis

Innocent stands out from the crowd and enjoys innovative, ethical image

Figure 33: User profile of Innocent, September 2015

Tropicana more likely to be described as delicious and refreshing

Figure 34: User profile of Tropicana, September 2015

Ribena is a trusted brand, helped by reputation and history

Figure 35: User profile of Ribena, September 2015

Robinsons Fruit Shoot has lower usage than all brands but higher trust than Capri-Sun

Figure 36: User profile of Robinsons Fruit Shoot, September 2015

Oasis lacks standout but has positive scores for experience-based attributes

Figure 37: User profile of Oasis, September 2015

Capri-Sun struggles to engage with older groups

Figure 38: User profile of Capri-Sun, September 2015

The Consumer – What You Need to Know

Fruit juice is drunk by almost three in four UK adults

Almost half drink fruit juice once a week or more

Fruit juice is seen as better for you by nearly three in four

Fruit and vegetable blends for children and fair trade ingredients appeal

Steps to reduce sugar top enticements

Sugar is top reason for cutting back/not buying fruit juice/smoothies

Usage of Fruit Juice, Juice Drinks and Smoothies

Fruit juice is the most popular, drunk by almost three in four UK adults

Figure 39: Usage of fruit juice, juice drinks and smoothies, September 2015

Four in 10 drink 100% fruit juice, juice drinks and smoothies

Figure 40: Crossover in usage of fruit juice, juice drinks and smoothies, September 2015

Almost half drink fruit juice once a week or more

Figure 41: Usage of fruit juice, juice drinks and smoothies, by frequency, September 2015

Fruit juice from concentrate is the most popular format

Figure 42: Types of fruit juice, juice drinks and smoothies drunk, September 2015

Just over a quarter have drunk home-made juice/smoothies

Freshly made in front of you

Figure 43: Usage of fruit juice/smoothies freshly made in front of you, September 2015

Freshly made by yourself

Figure 44: Usage of fruit juice/smoothies freshly made by yourself, September 2015

Attitudes towards Fruit Juice, Juice Drinks and Smoothies

Nearly three in four users see fruit juice as healthier than CSDs

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Fruit Juice, Juice Drinks and Smoothies - UK - November 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 45: Attitudes towards fruit juice, juice drinks and smoothies, September 2015

Catering to children's market would be well received

Untapped interest in fair trade ingredients ...

... and British ingredients

Fruit Juice, Juice Drinks and Smoothies Enticements

Reduced sugar tops enticements

Figure 46: Interest in selected fruit juice, juice drinks and smoothies enticements, September 2015

Cold-pressed varieties appeal to a third

Opportunities for more interesting ingredients

Buying Habits of Fruit Juice and Smoothies

The majority are buying the same amount as six months ago

Figure 47: Changes in purchase patterns of fruit juice/smoothies over the last six months, September 2015

Healthier options drive those buying more

More than a third have switched from other soft drinks

Figure 48: Reasons for buying more fruit juice/smoothies, September 2015

Concern over sugar content is the top reason for not buying/buying less

Cost is still an issue for 24%

Figure 49: Reasons for buying less or not buying fruit juice/smoothies, September 2015

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Fan chart forecast

Appendix – Market Drivers

Figure 50: Trends in the age structure of the UK population, 2010-20

Appendix – Market Size and Forecast and Segment Performance

Figure 51: Best- and worst-case forecasts for the total UK fruit juice, juice drinks and smoothies market, by value, 2015-20

Figure 52: Best- and worst-case forecasts for the total UK fruit juice, juice drinks and smoothies market, by volume, 2015-20

Figure 53: Best- and worst-case forecasts for the UK fruit juice market, by value, 2015-20

Figure 54: Best- and worst-case forecasts for the UK fruit juice market, by volume, 2015-20

Figure 55: Forecast of UK retail sales of fruit juice, by volume, 2010-20

Figure 56: Best- and worst-case forecasts for the UK juice drinks market, by value, 2015-20

Figure 57: Best- and worst-case forecasts for the UK juice drinks market, by volume, 2015-20

Figure 58: Forecast of UK retail sales of juice drinks, by volume, 2010-20

Figure 59: Best- and worst-case forecasts for the UK smoothies market, by value, 2015-20

Figure 60: Best- and worst-case forecasts for the UK smoothies market, by volume, 2015-20

Figure 61: Forecast of UK retail sales of smoothies, by volume, 2010-20

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com