

The Grocer

Focus On: Juices & Smoothies by Natalie Brown (natalie_brown@live.co.uk)

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The Story

It's been a rough year for juices & smoothies but there's still some cause for optimism: the rate at which volumes are falling has more than halved in the past year, suggesting the backlash against sugar could be starting to wane, perhaps as a result of the development of 'healthier', lower sugar products. Is this the case? What is driving the market's decline and what does the coming year hold for juices & smoothies?

Key themes:

'Healthier' juices: The sugar debate has fuelled the development of juice drinks sweetened with ingredients such as stevia, in order to lower sugar content, and juices and smoothies containing functional ingredients such as chia seeds, vegetables and coconut. How well are such products doing? How much of the market do they account for? How much potential do they have?

Promotions and price: Prices are falling, driven primarily by fierce deals on own label juices & smoothies. So are we going to see a return to the sort of pile high, sell cheap mentality that defined the market a few years ago? Just how price sensitive is the market? And what are brands doing to maintain market value?

Juice drinks: This sector continues to struggle. This feature will explore in detail which factors – for example, the health agenda, NPD, marketing and advertising, price and promotions – have driven this performance and investigate how players are looking to turn things around over the coming year. Particular attention will be paid to the impact of multiple delistings of added sugar lines.

Smoothies: This sector has been one of the category's worst performers over the past year. Why? Which players have suffered the greatest declines? Who's in growth? What are the sector's major players looking to do to sustain growth in 2016?

Not from concentrate: This sector has seen volumes rise on flat value sales over the past year. This feature will explore the reasons for this and investigate what the coming year is likely to hold. How are some brands still in growth? How is the dynamic between own label and brands playing out?

From concentrate: Sales of from concentrate juice have continued to decline over the past year. Do brands and own label players have some tricks up their sleeve to rekindle interest – and sales – in this sector?

Own label: Own label is losing value share to brands in this market, but volumes are up. This feature will explore the factors that are leading to this and investigate how retailers' own label ranges are evolving.

Innovation: This will be key to this feature. We will be investigating how new product development has shaped the category over the past year and what is in store for shoppers in 2014. We will be profiling four of the most interesting launches in a separate innovation panel. This feature will include box outs on the development of new, weird and wonderful flavoured juices and smoothies (kale, lemon grass, pomegranate, etc) and kids drinks.

Powdered super juices: Some brands appear to be spending growing amounts on promoting the health benefits of superfood powders that can be mixed with water to provide a healthy drink. How are sales performing? What's in these drinks and are new superfood drinks being developed? What are their potential in the mainstream?

Key questions the feature is likely to address:

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers' strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What's next for the category?