

Household Purchase Dynamics in the Beverage Category

Nielsen Homescan Household Purchase Analysis
Florida Department of Citrus

March 2019



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Objectives

- **Identify Beverage Purchase Trends**
 - Provide an overview of beverage category purchase patterns and trends
 - Identify changing dynamics among orange juice (OJ), grapefruit juice (GJ) and competitive fruit juices
 - Detail OJ and GJ household purchasing trends

Parameters

- **The Homescan Consumer Purchase Panel:**
 - 51,000 households recording purchases brought home
 - Demographically & geographically balanced to represent U.S. population
- **The Data:**
 - All UPC coded purchases from all outlets
 - Consumer perceived details (i.e. coupons & store sales)
- **Time Periods:**
 - Year ending 12/22/2018 vs. Year-Ago
- **Volume:**
 - Equivalent gallons

Parameters

- **Geography:**
 - Total U.S., All Outlets
- **Category Definition:**
 - TLL Beverages consists of the following segments:
 - Carbonated Soft Drinks (CSD)
 - Ref, White & Flav Milk
 - Liquid Tea
 - Bottled Water
 - Isotonics
 - Dry Coffee
 - Shakes & other meal replacement drinks
 - Non-Carb Soft Drinks (non CSD)
 - Liquid Coffee
 - Light Beer*
 - Fruit Juices & Drinks
 - Vegetable Juice/Dks
 - Dry Tea

*Still included in category total (for consistency), not reported separately

Parameters

- **Definition of Measures:**

- **Household Penetration**

- Percentage of U.S. Households (HHs) buying product at Retail*

- **Buying Rate**

- Average number of gallons purchased annually at retail by Buying HHs*

- **Purchase Frequency**

- Average number of times per year product was purchased at retail by Buying HHs*

- **Purchase Size**

- Average amount (gallons) purchased every time product is purchased at retail*

- **% Purchased on Perceived Deal**

- Percent of product bought at retail when Buyer thought it was on deal (coupon, shelf discount, etc.)*

Parameters

- **Acronyms and Abbreviations**

- AO = All Others
- Btl = Bottled
- CSD = Carbonated Soft Drink
- DK = Drink
- Frt = Fruit
- GJ = Grapefruit Juice
- HHs = Households
- JC = Juice
- Lt OJ = Orange Juice Drink containing 40-99.9% OJ
- NFC = Not From Concentrate
- Non CSD = Non-Carbonated Soft Drink (e.g. Kool Aid)
- OJ = Orange Juice
- Recon = Reconstituted
- TL = Total
- WHC = Warehouse Club (e.g. Sam's, Costco)

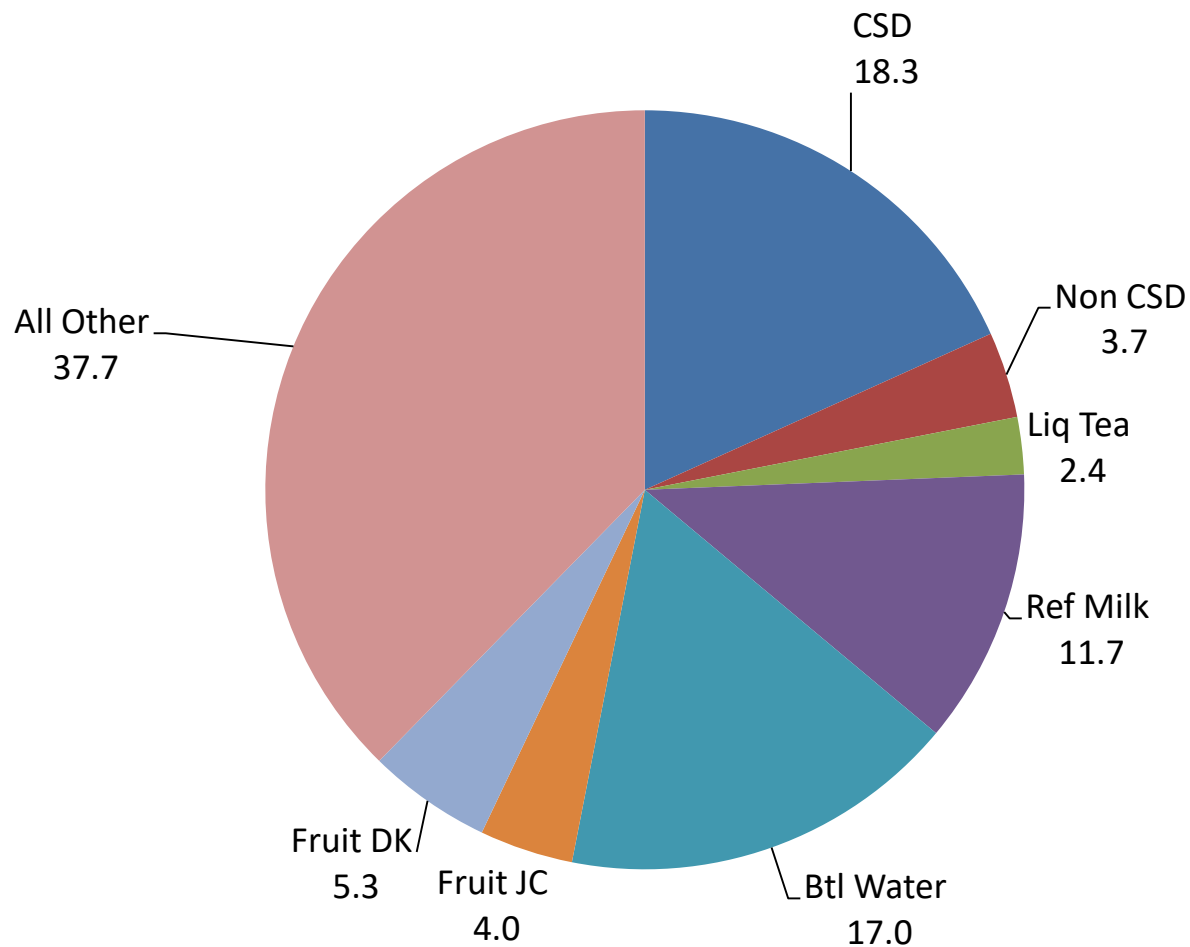
Parameters

- **Reported Here:**
 - Market Summary Findings for 2018
 - *Products*
 - *Channels (types of retail stores)*
 - *Measures*
 - *Buyer groups*
 - Two-Year Trends

Volume & Share Trends in Beverage Categories



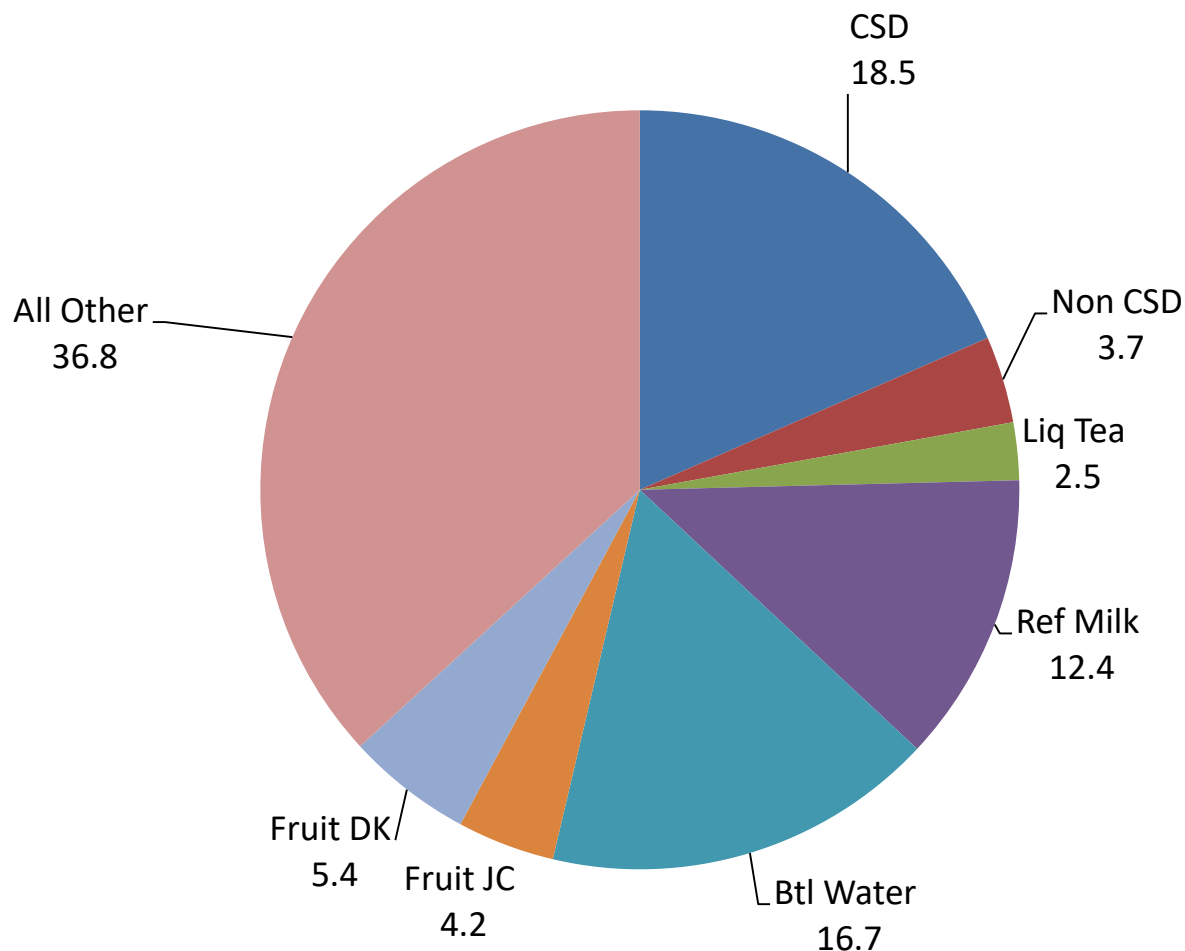
Beverage Category Gallon Shares in 2018



Source: Nielsen Homescan™ data for Y/E Dec 2018



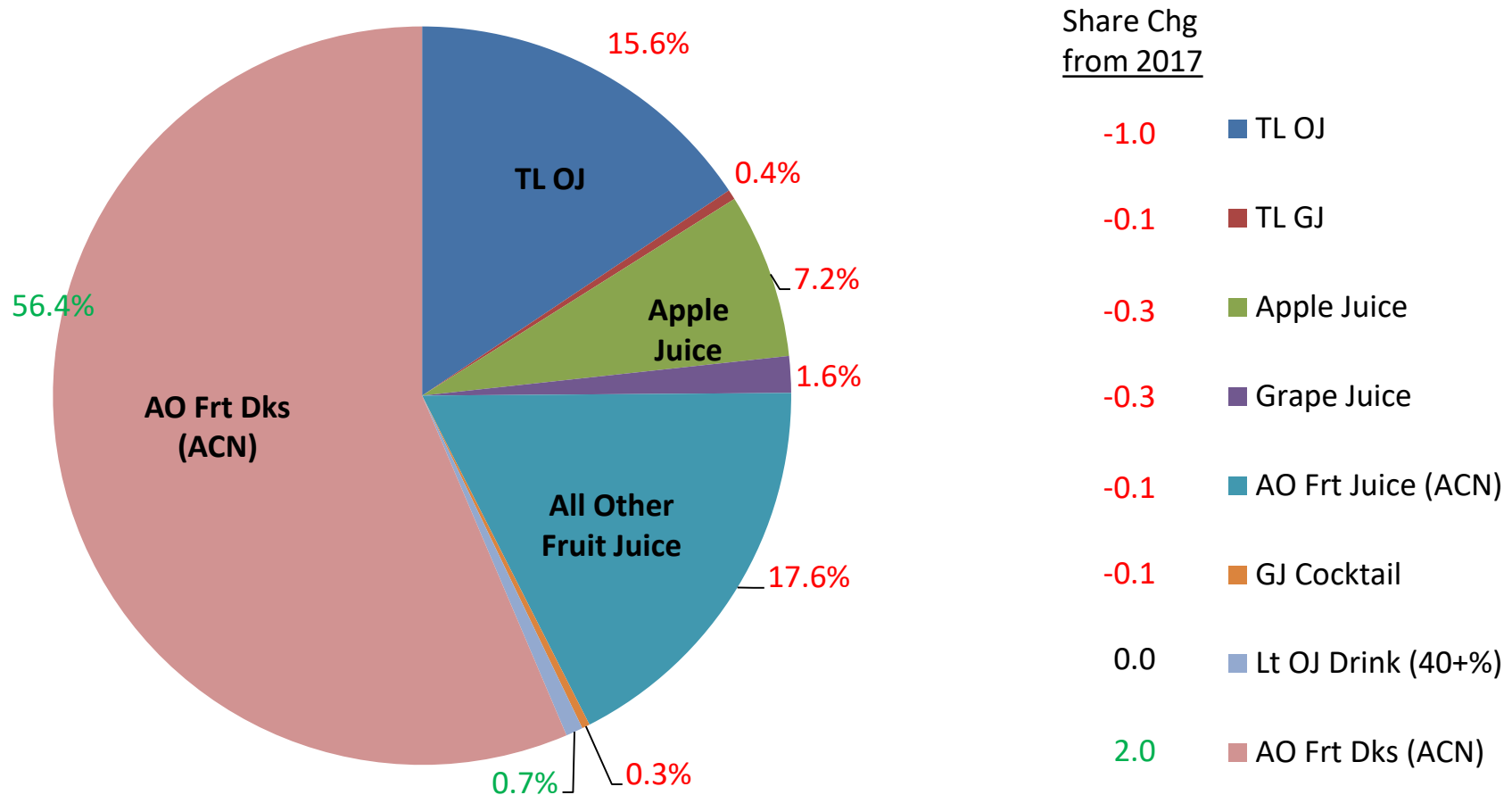
Beverage Category Gallon Shares in 2017



Source: Nielsen Homescan™ data for Y/E Dec 2018



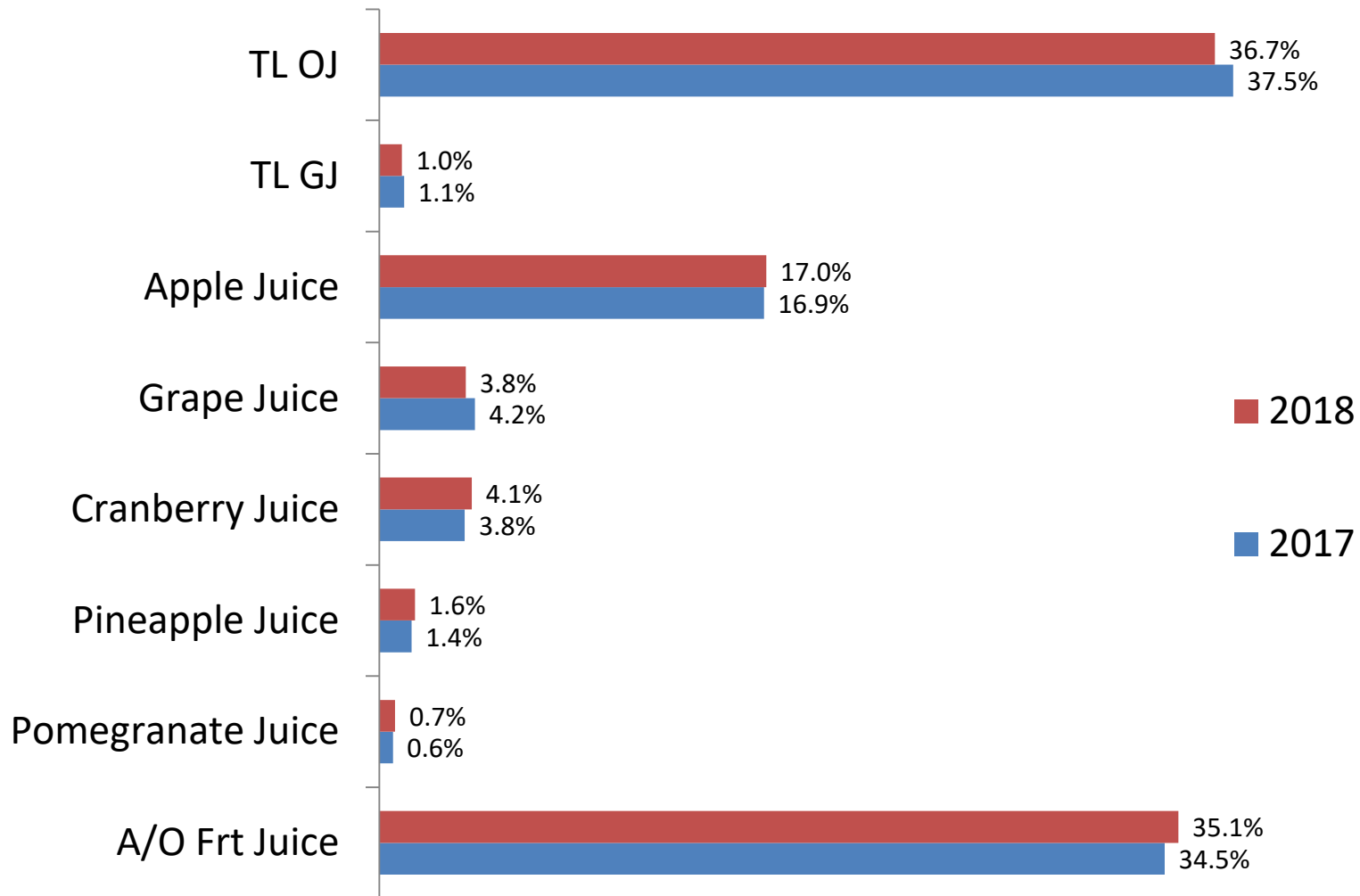
Shares of Fruit Juice/Fruit Drinks (ACN) in 2018 (Gallon Shares)



Source: Nielsen Homescan™ data for Y/E Dec 2018



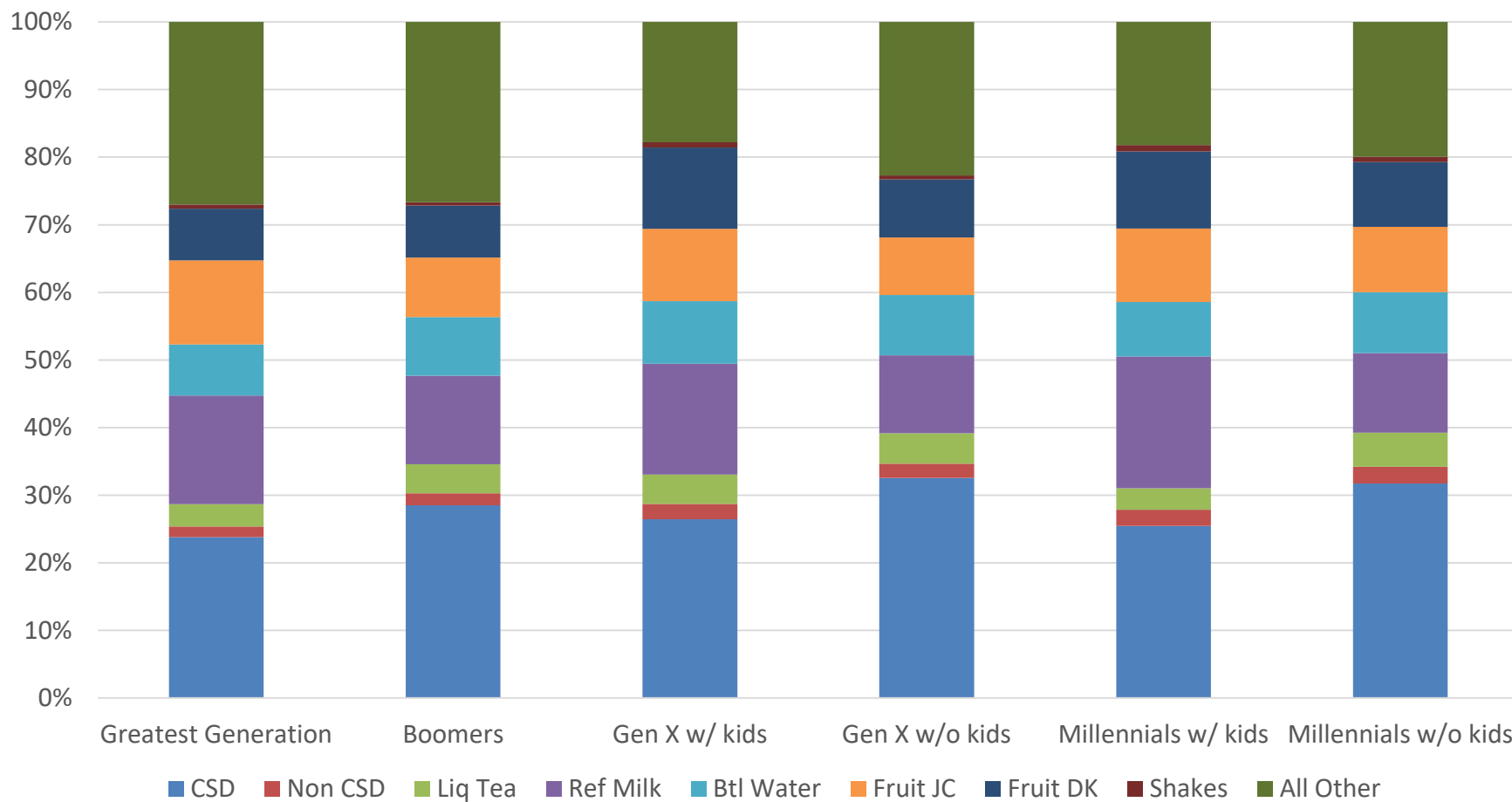
Shares of Fruit Juice Gallons (ACN)



Source: Nielsen Homescan™ data for Y/E Dec 2018



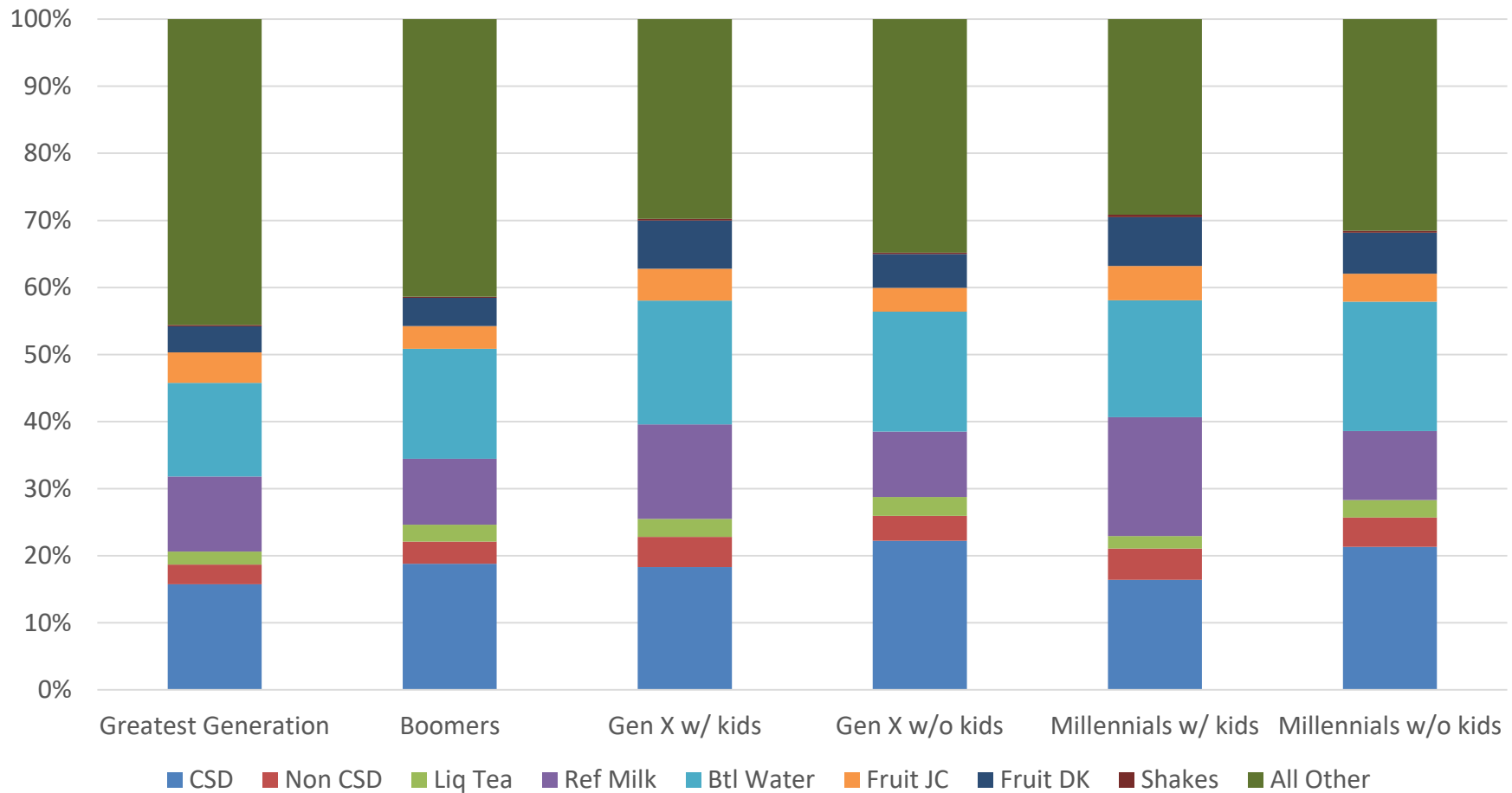
Beverage Category Dollar Shares in 2018



Source: Nielsen Homescan™ data for Y/E Dec 2018



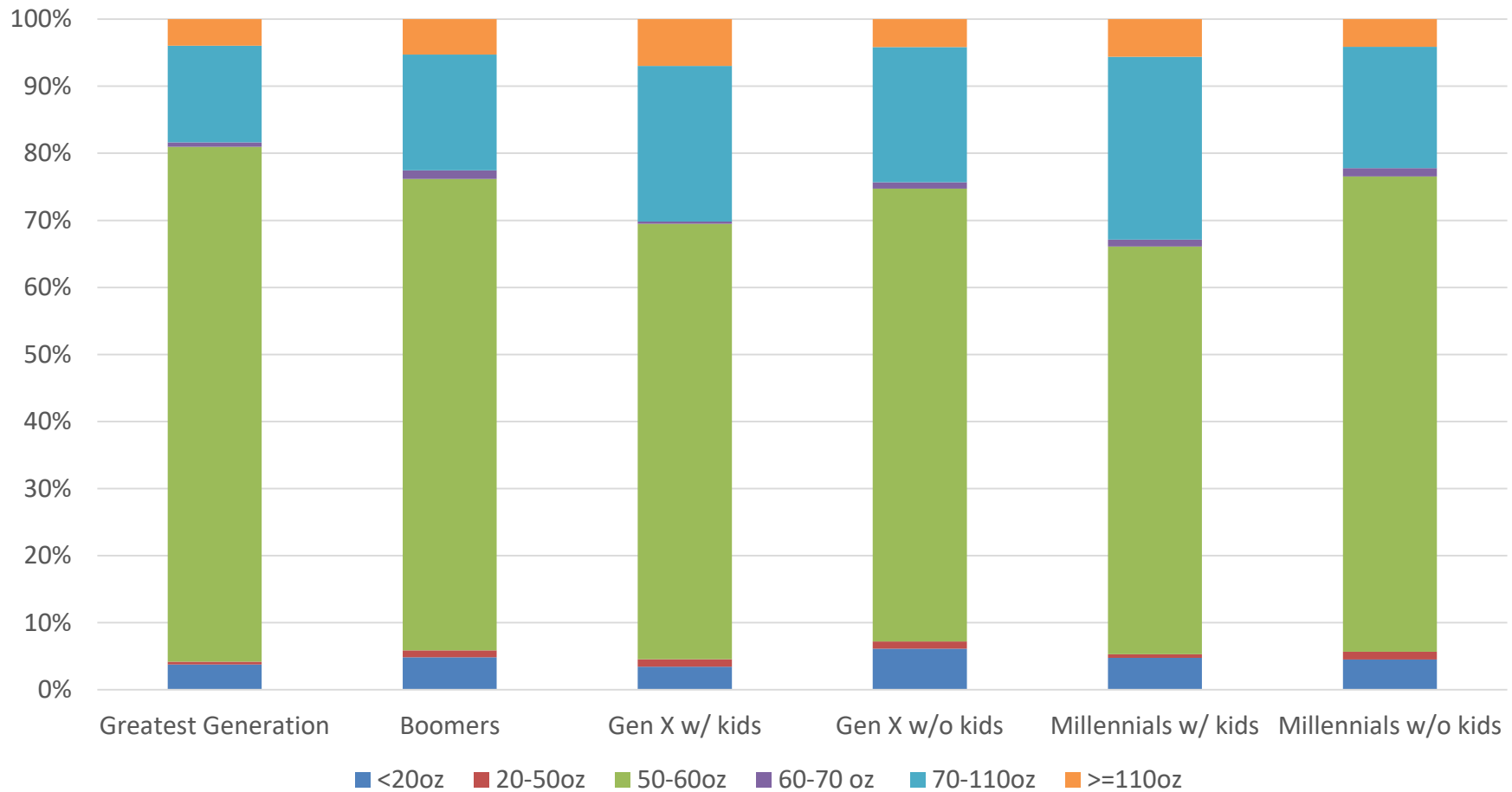
Beverage Category Volume Shares in 2018



Source: Nielsen Homescan™ data for Y/E Dec 2018



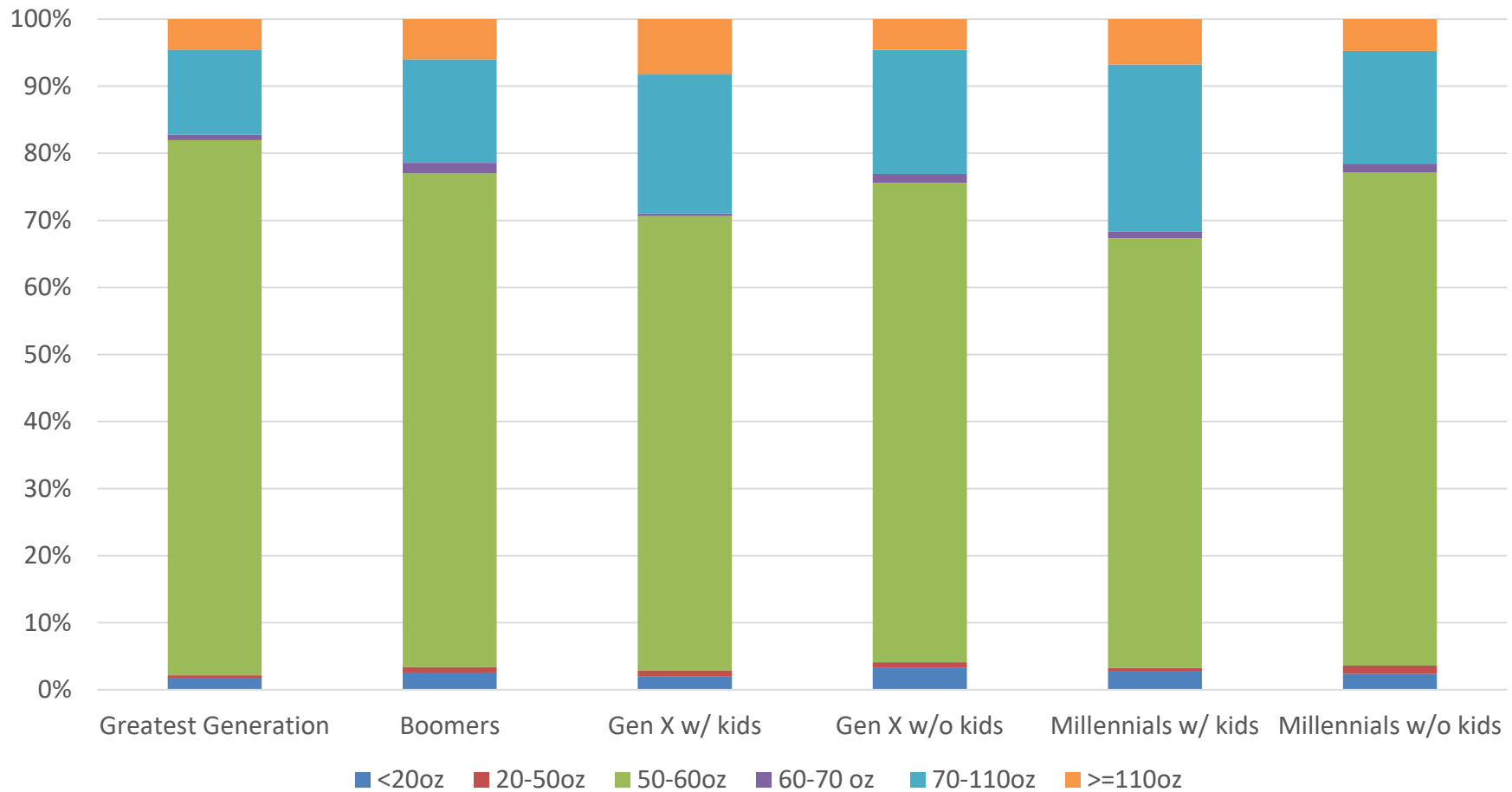
OJ NFC Dollar Shares in 2018



Source: Nielsen Homescan™ data for Y/E Dec 2018



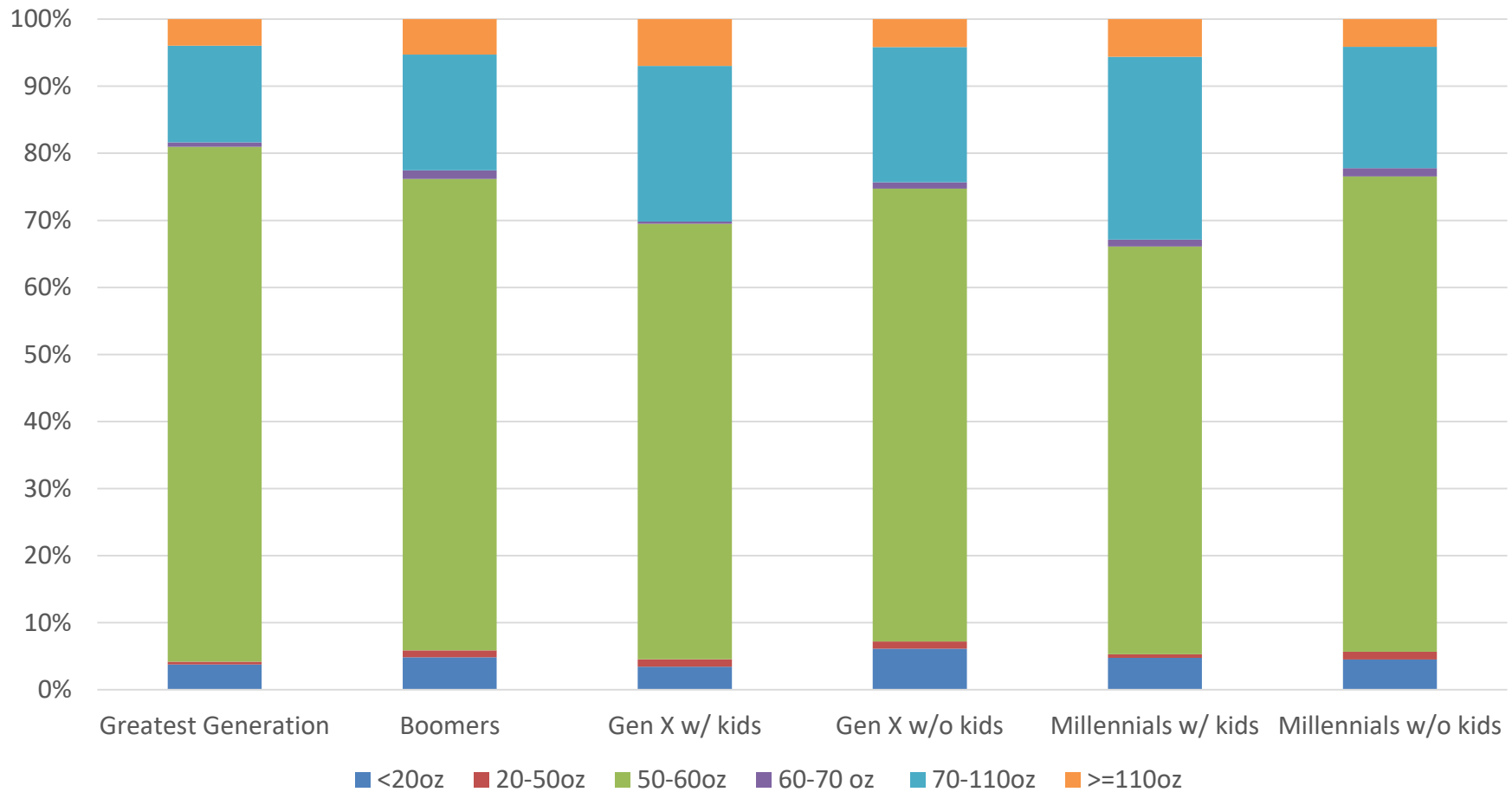
OJ NFC Volume Shares in 2018



Source: Nielsen Homescan™ data for Y/E Dec 2018



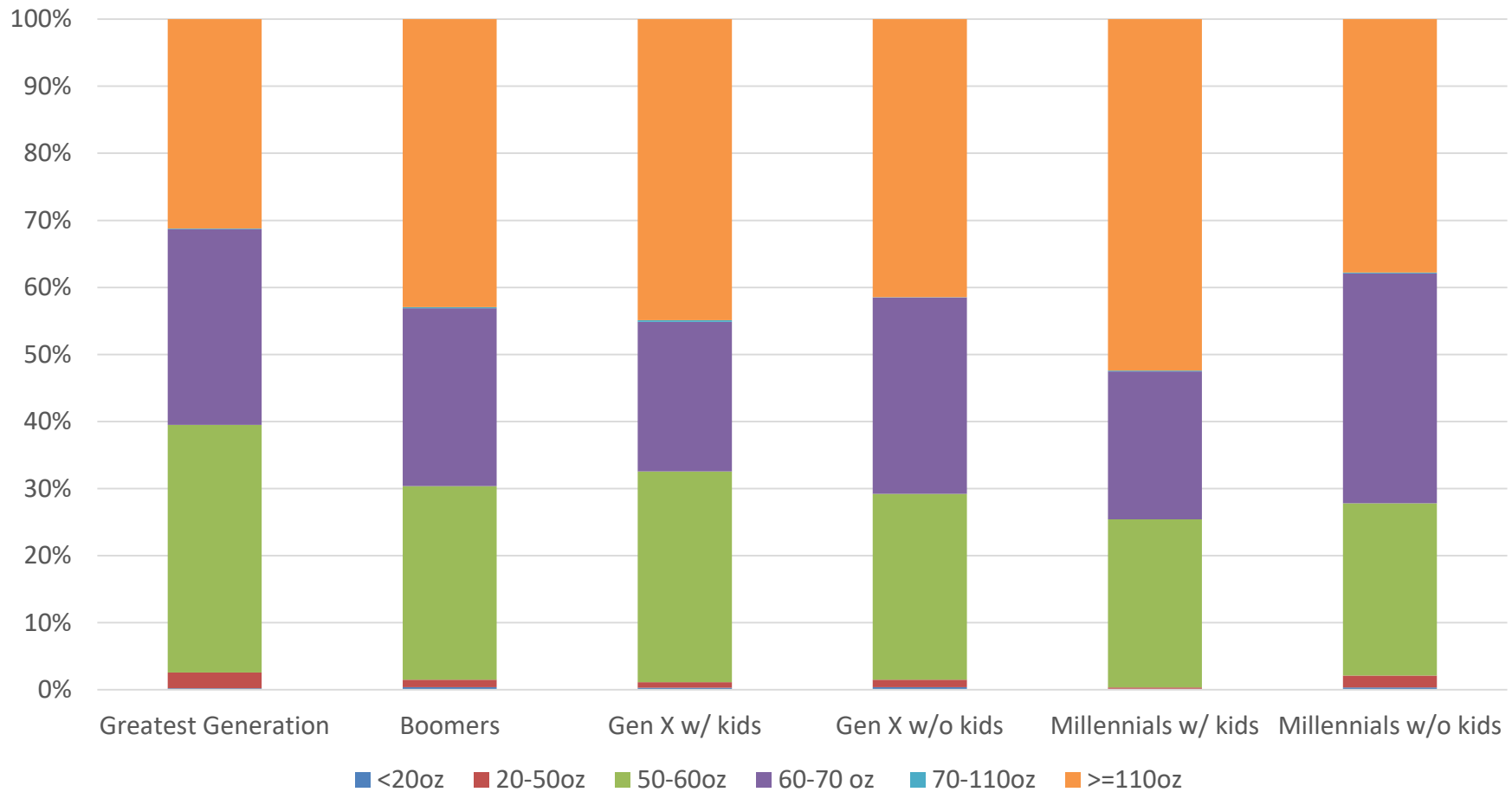
OJ Recon Dollar Shares in 2018



Source: Nielsen Homescan™ data for Y/E Dec 2018



OJ Recon Volume Shares in 2018



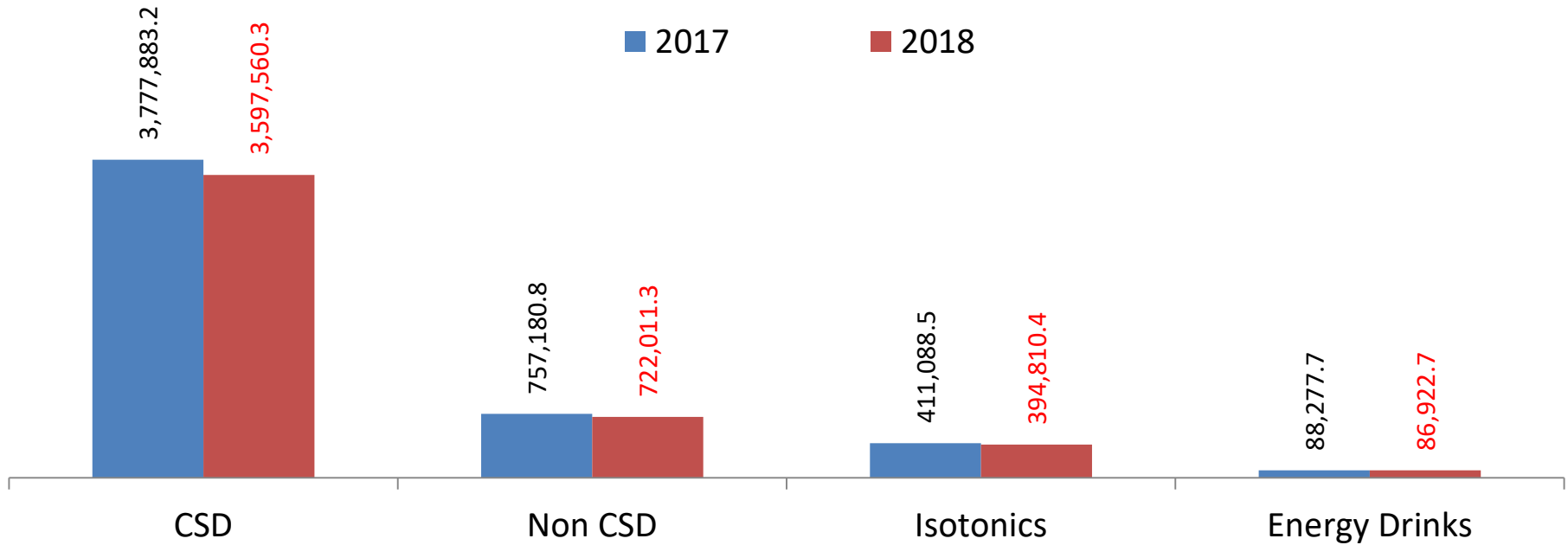
Source: Nielsen Homescan™ data for Y/E Dec 2018



Beverage Category Purchasing Overview



Soft Drink – Volume Sales

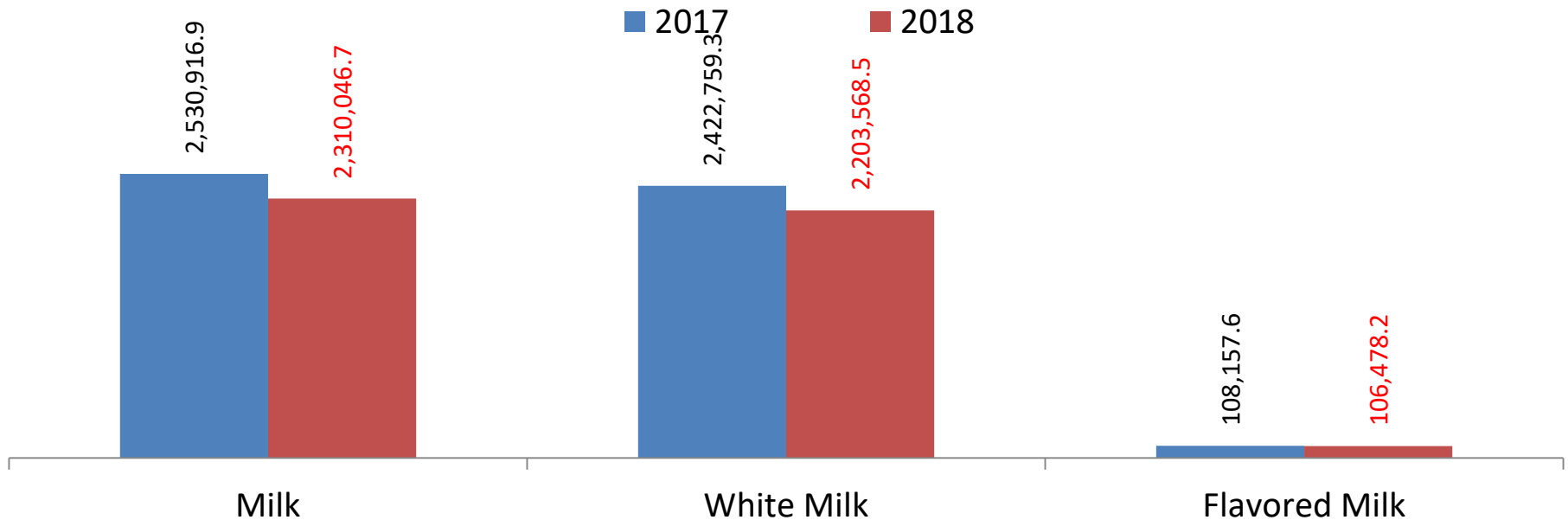


Volume Sales (000)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Milk – Volume Sales

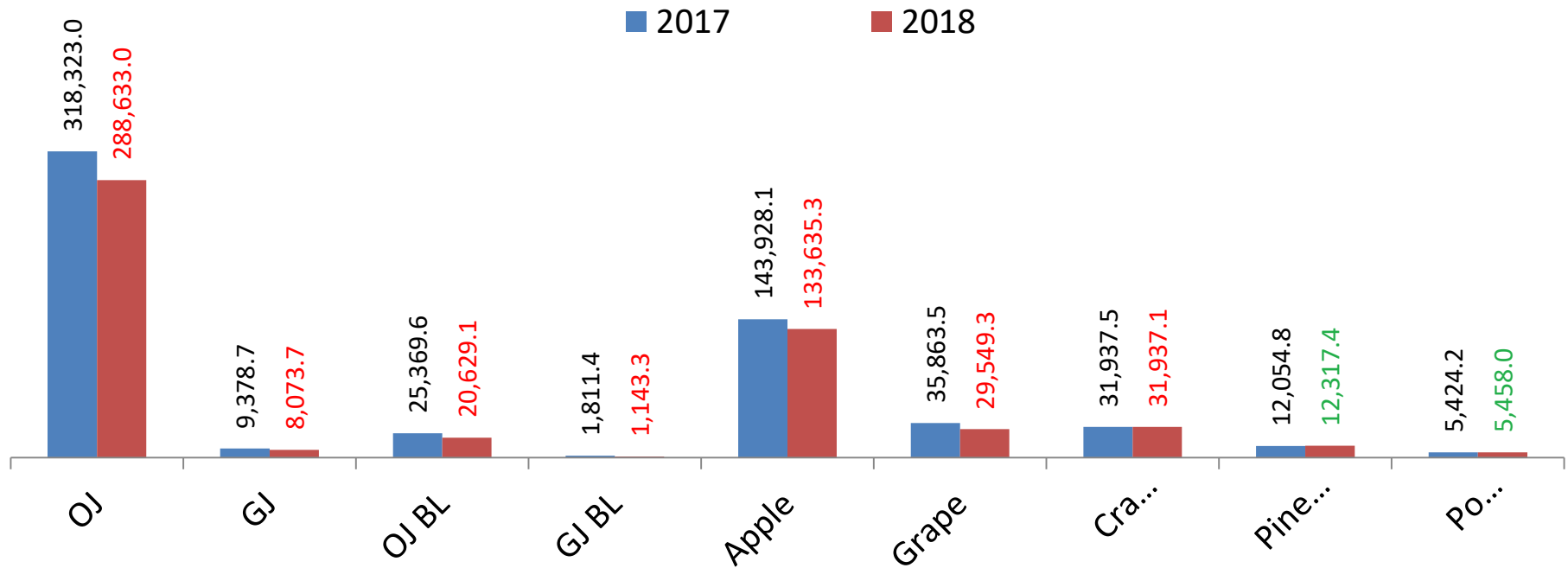


Volume Sales (000)

Source: Nielsen Homescan™ data for Y/E Dec 2018



100% Juice – Volume Sales

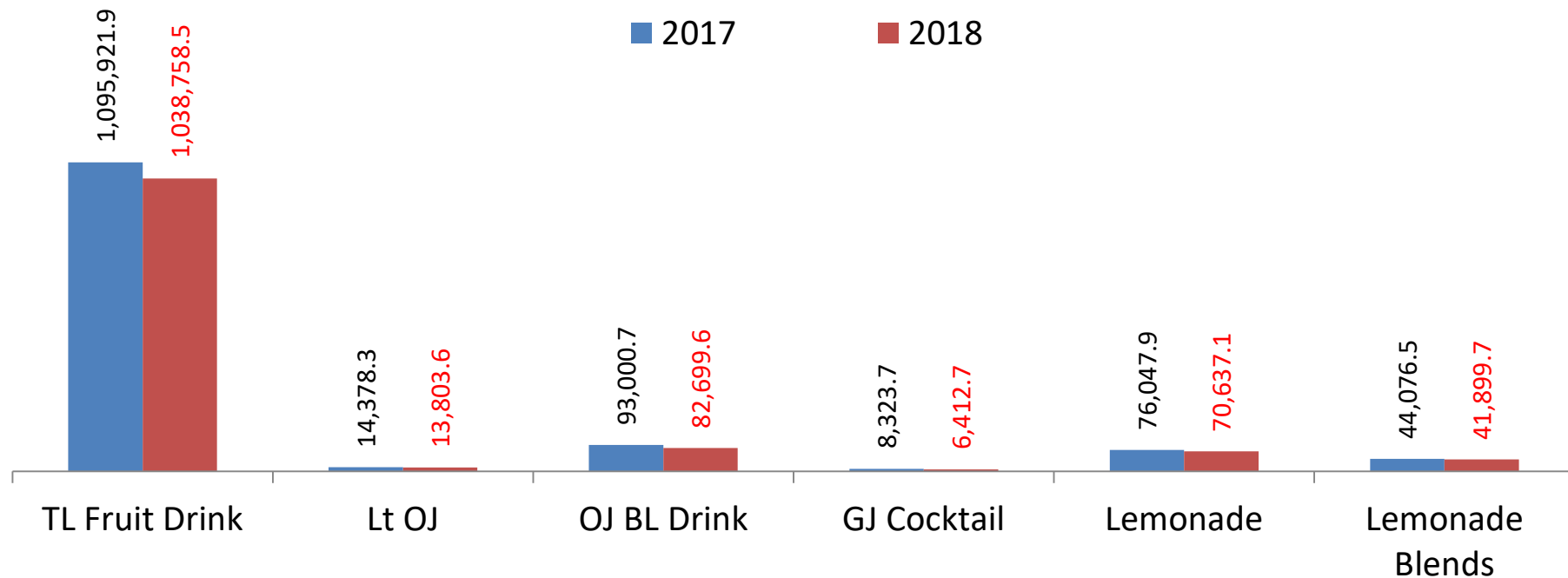


Volume Sales (000)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Fruit Drink – Volume Sales

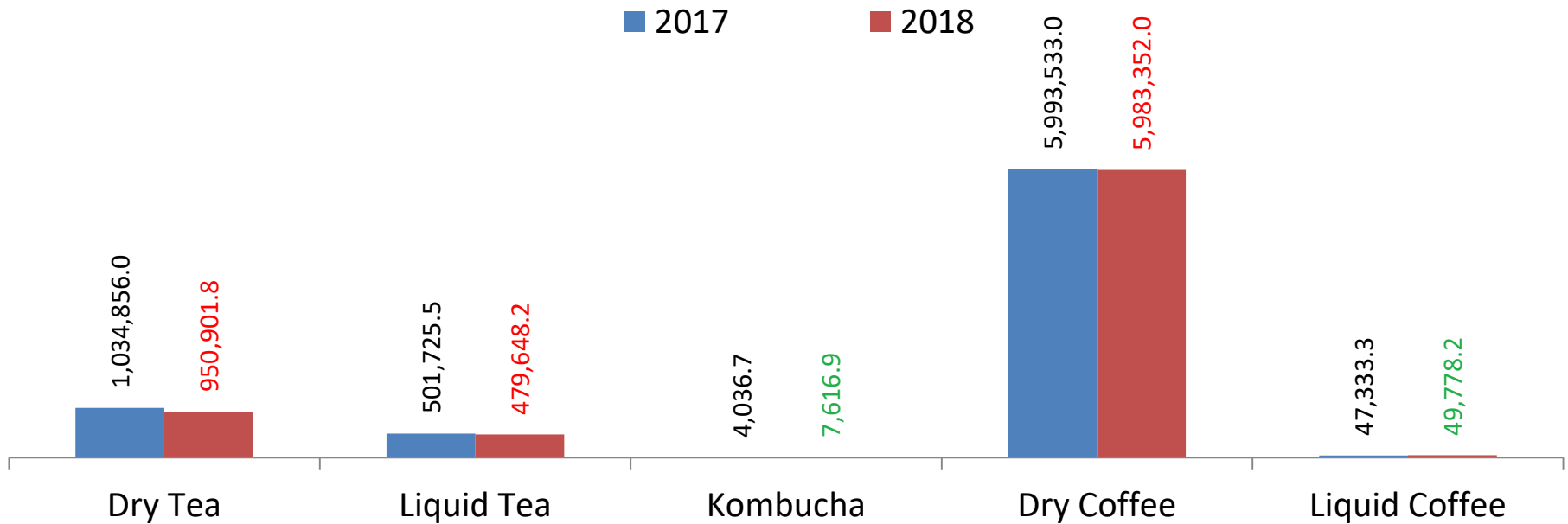


Volume Sales (000)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Tea/Coffee – Volume Sales

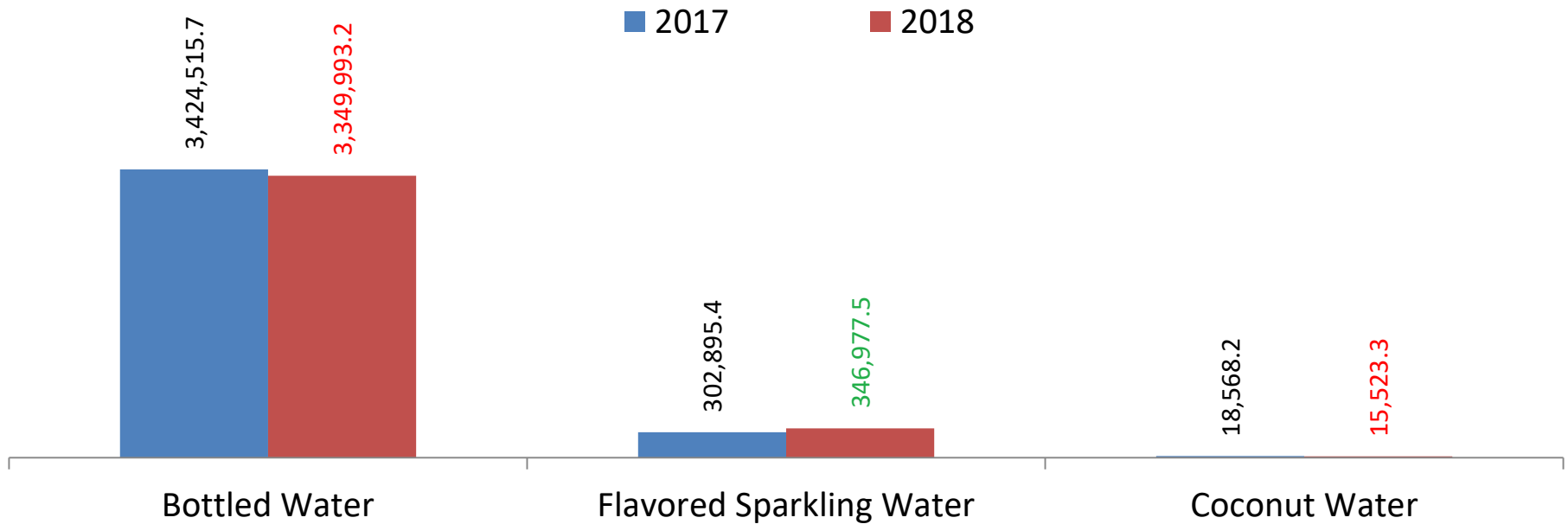


Volume Sales (000)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Water – Volume Sales

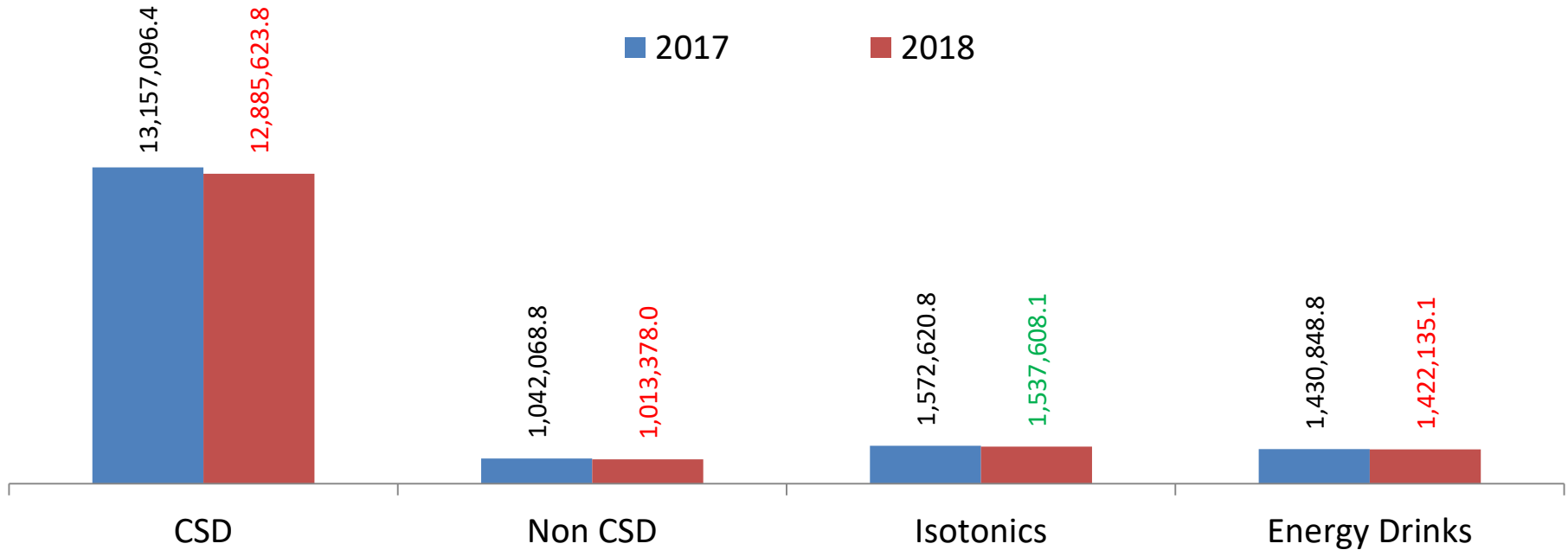


Volume Sales (000)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Soft Drink – Dollar Sales

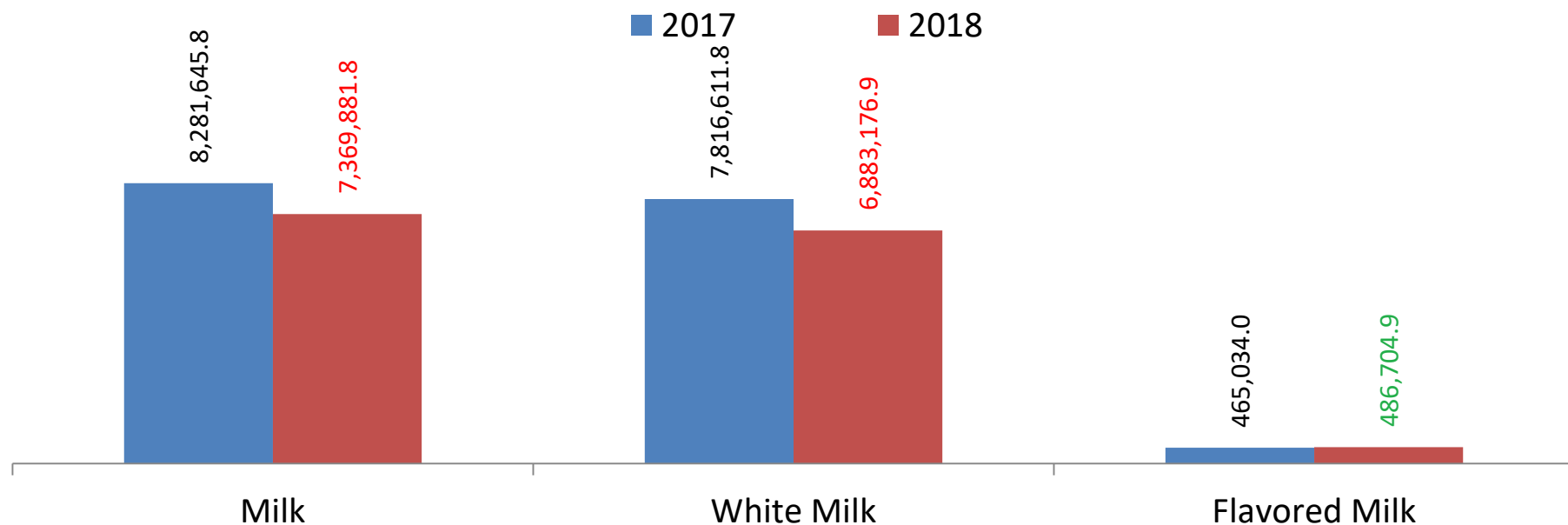


Dollar Sales (000)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Milk – Dollar Sales

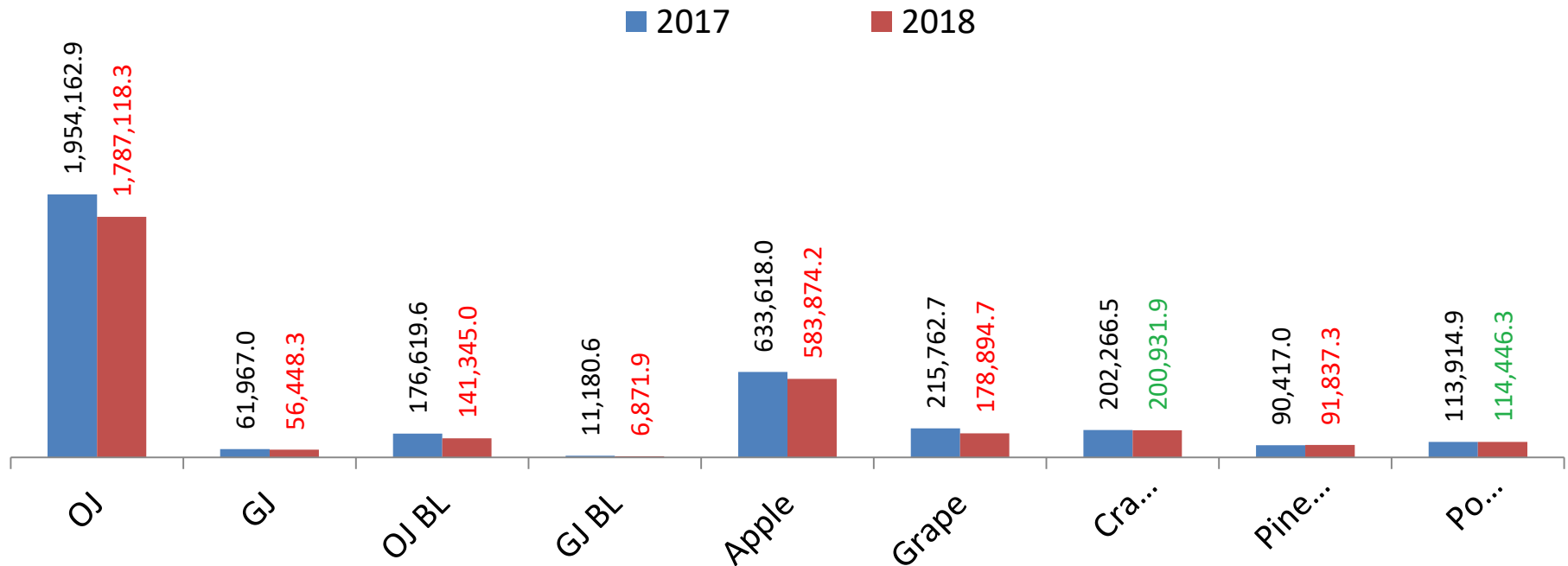


Dollar Sales (000)

Source: Nielsen Homescan™ data for Y/E Dec 2018



100% Juice – Dollar Sales

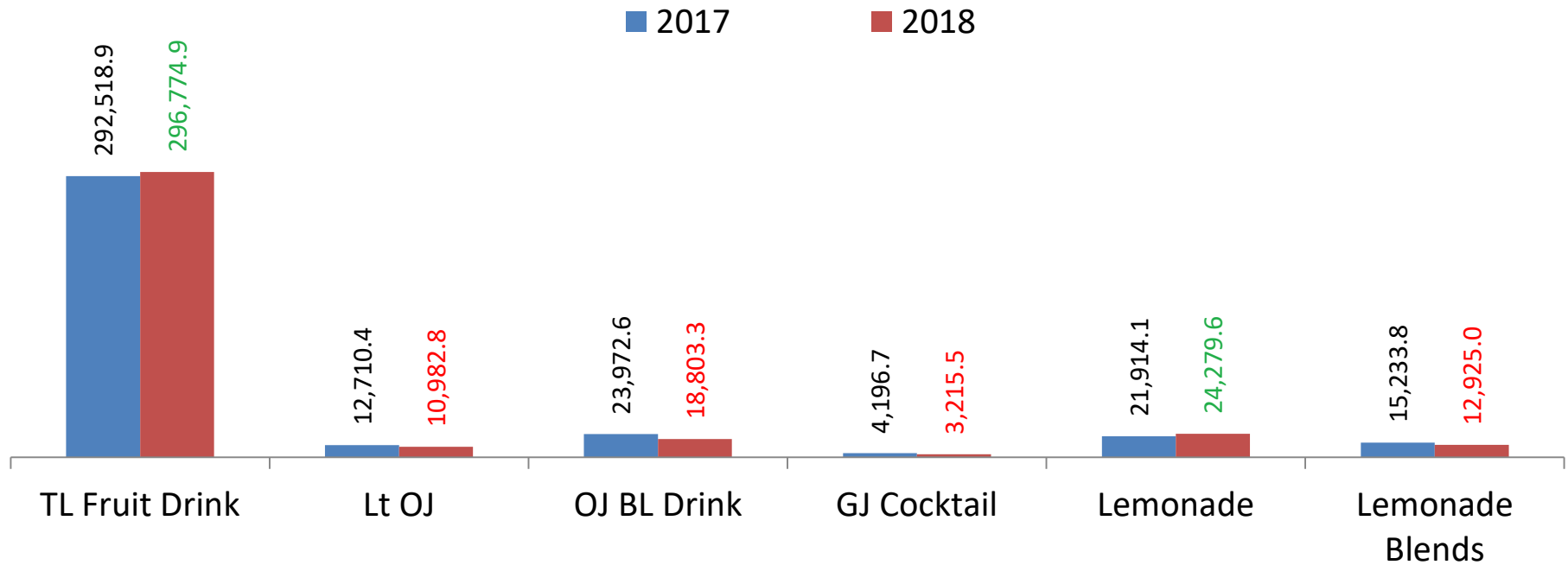


Dollar Sales (000)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Fruit Drink – Dollar Sales

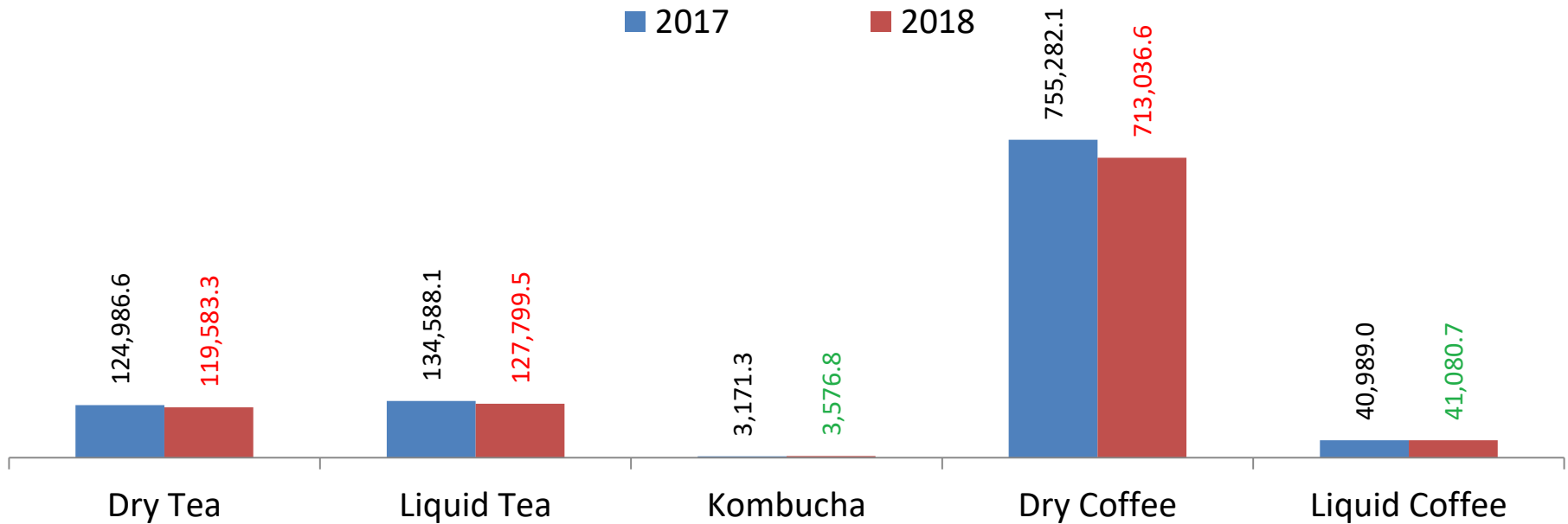


Dollar Sales (000)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Tea/Coffee – Dollar Sales

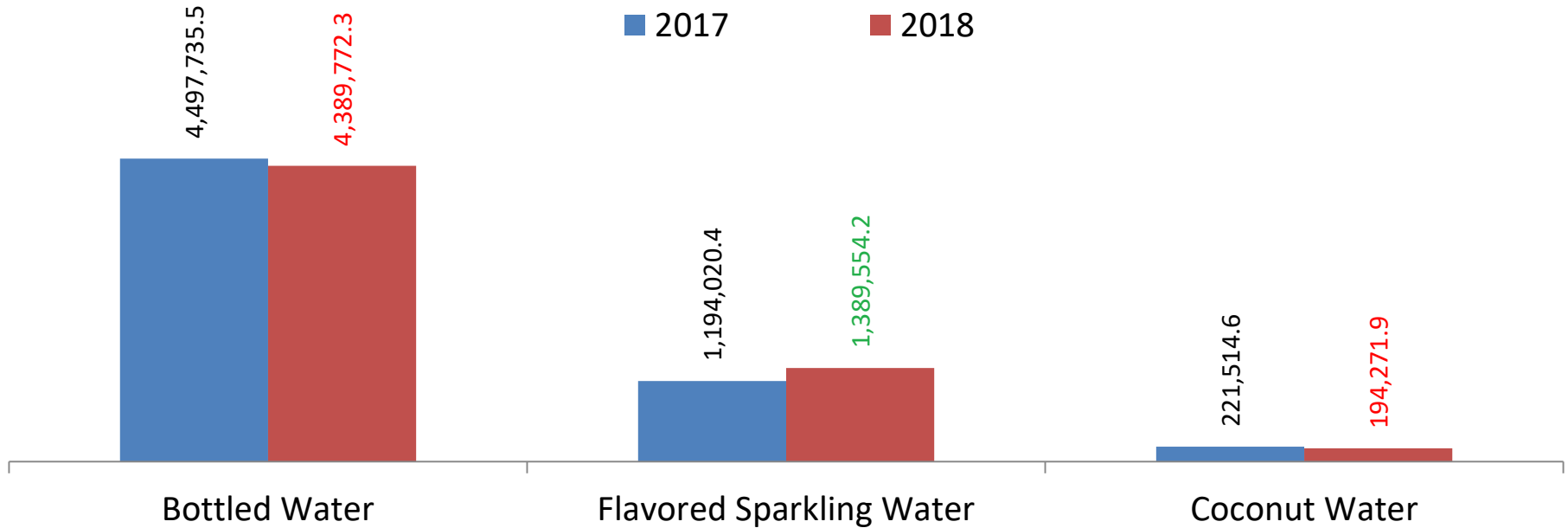


Dollar Sales (000)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Water – Dollar Sales

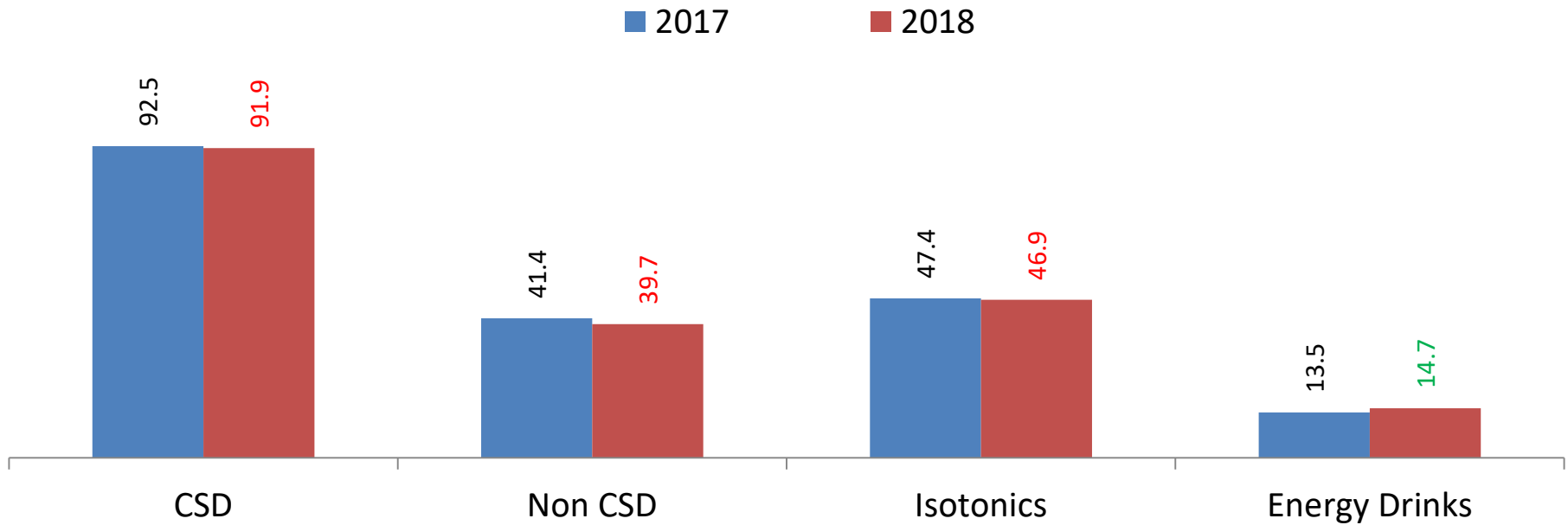


Dollar Sales (000)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Soft Drink – Penetration

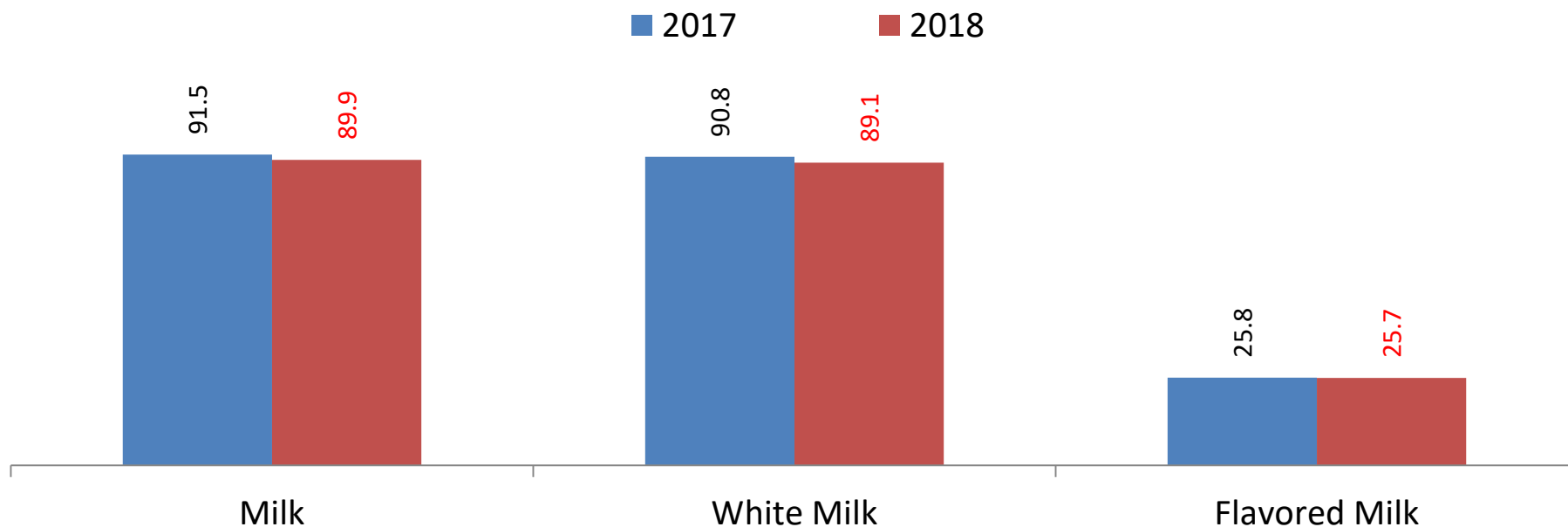


Household Penetration – Percentage of U.S. Households(HHs) buying product at Retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



Milk – Penetration

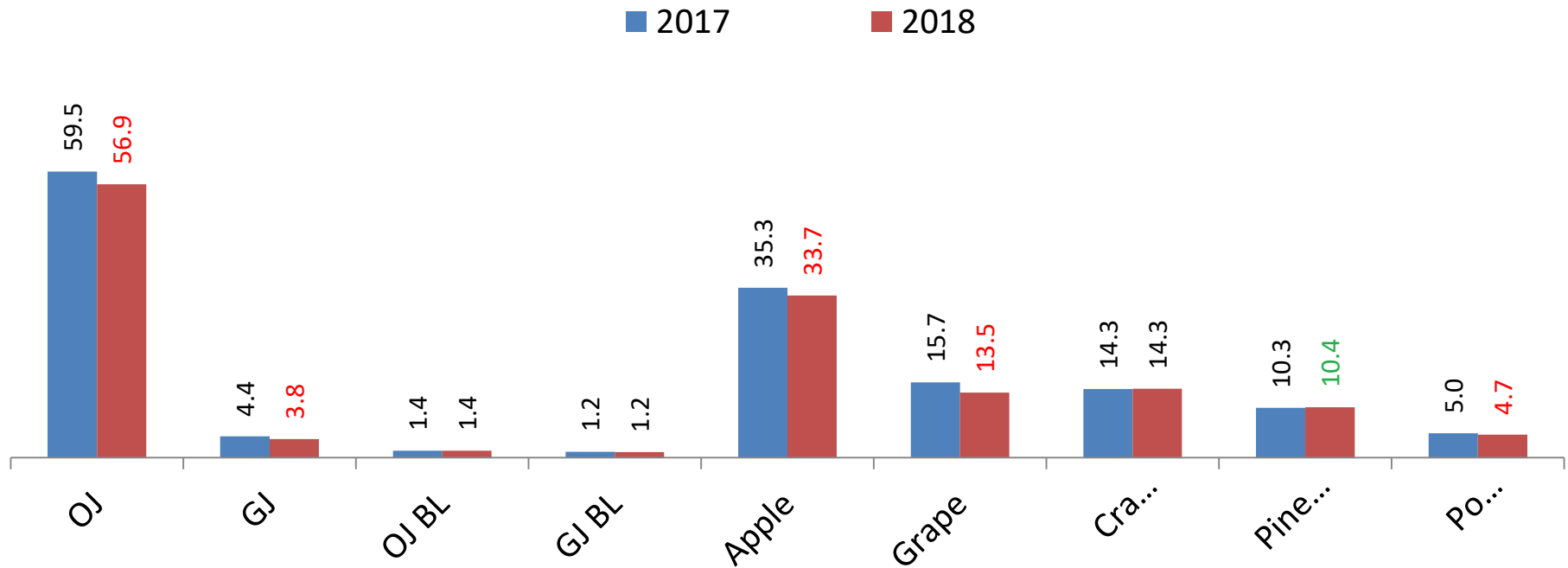


Household Penetration – Percentage of U.S. Households(HHs) buying product at Retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



100% Juice – Penetration

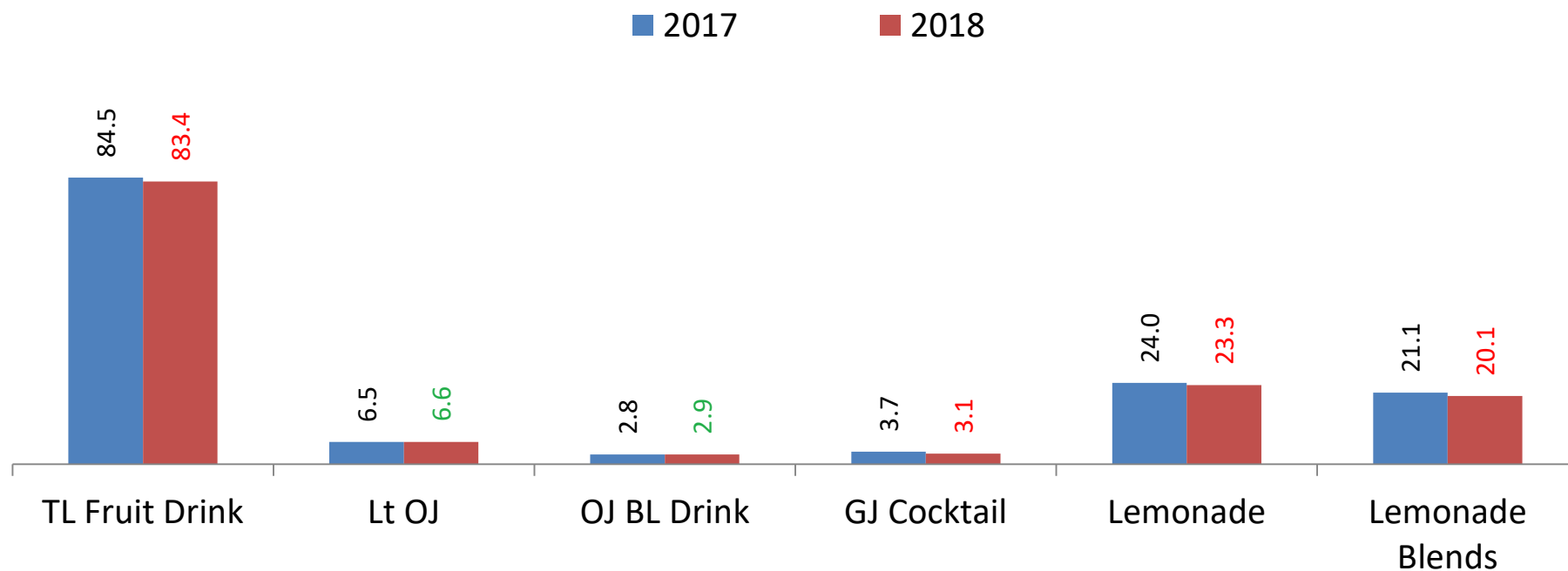


Household Penetration – Percentage of U.S. Households(HHs) buying product at Retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



Fruit Drink – Penetration

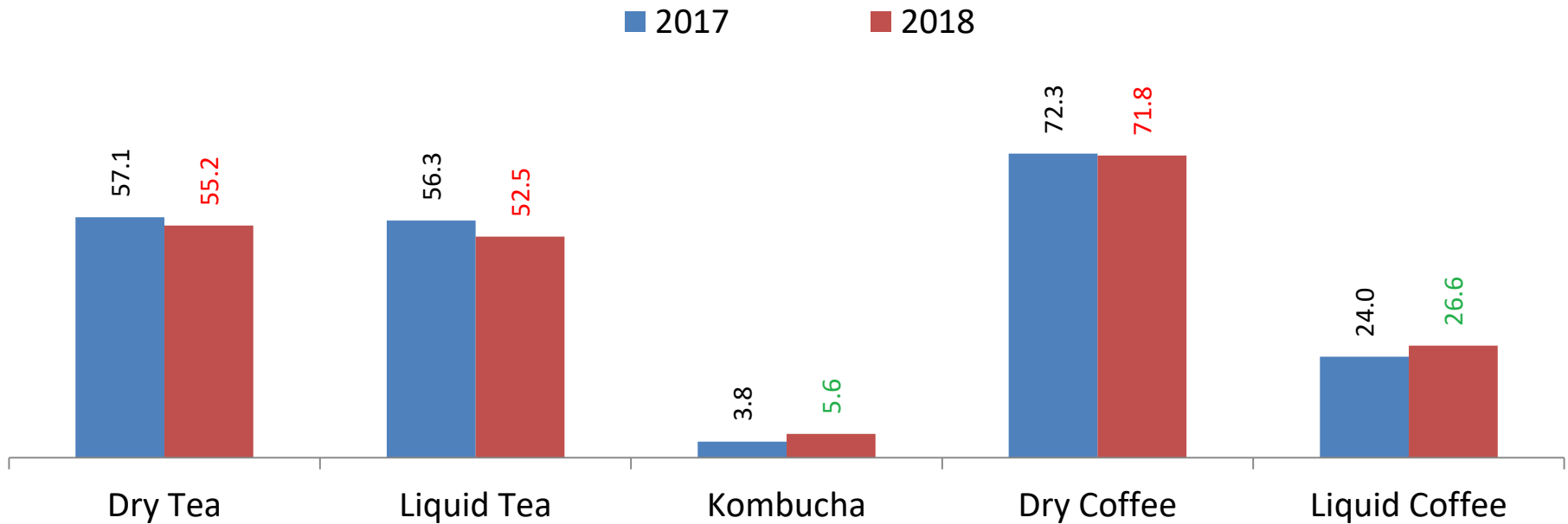


Household Penetration – Percentage of U.S. Households(HHs) buying product at Retail

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Tea/Coffee – Penetration

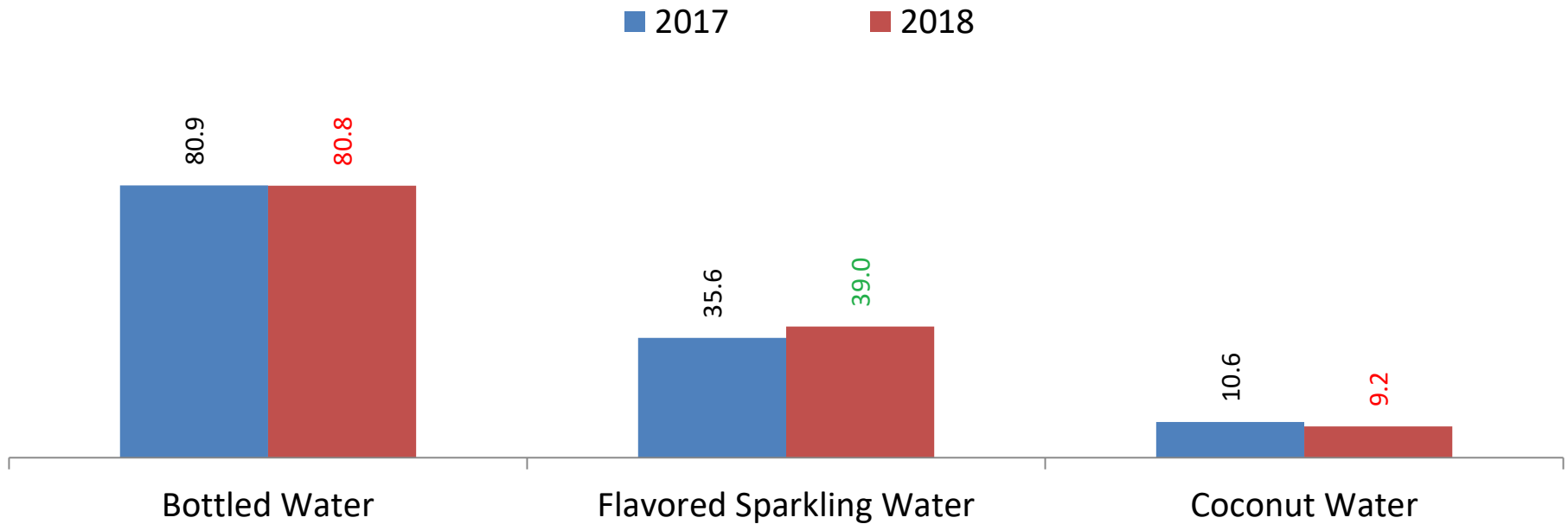


Household Penetration – Percentage of U.S. Households(HHs) buying product at Retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



Water – Penetration

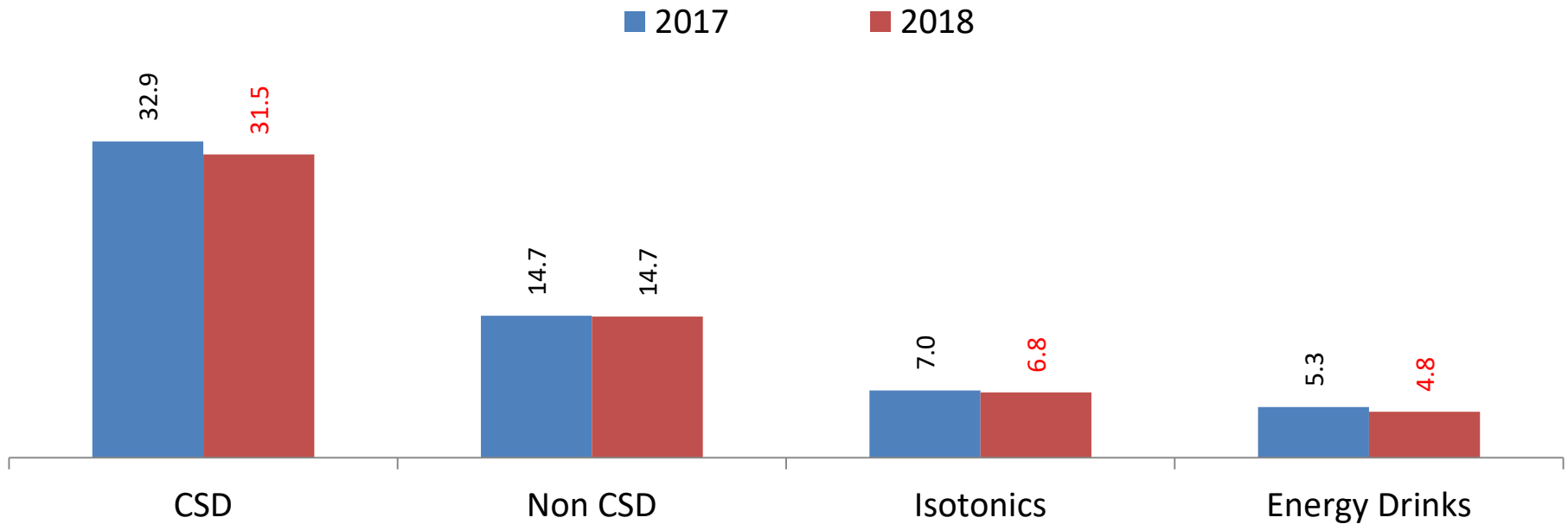


Household Penetration – Percentage of U.S. Households(HHs) buying product at Retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



Soft Drink – Buying Rate

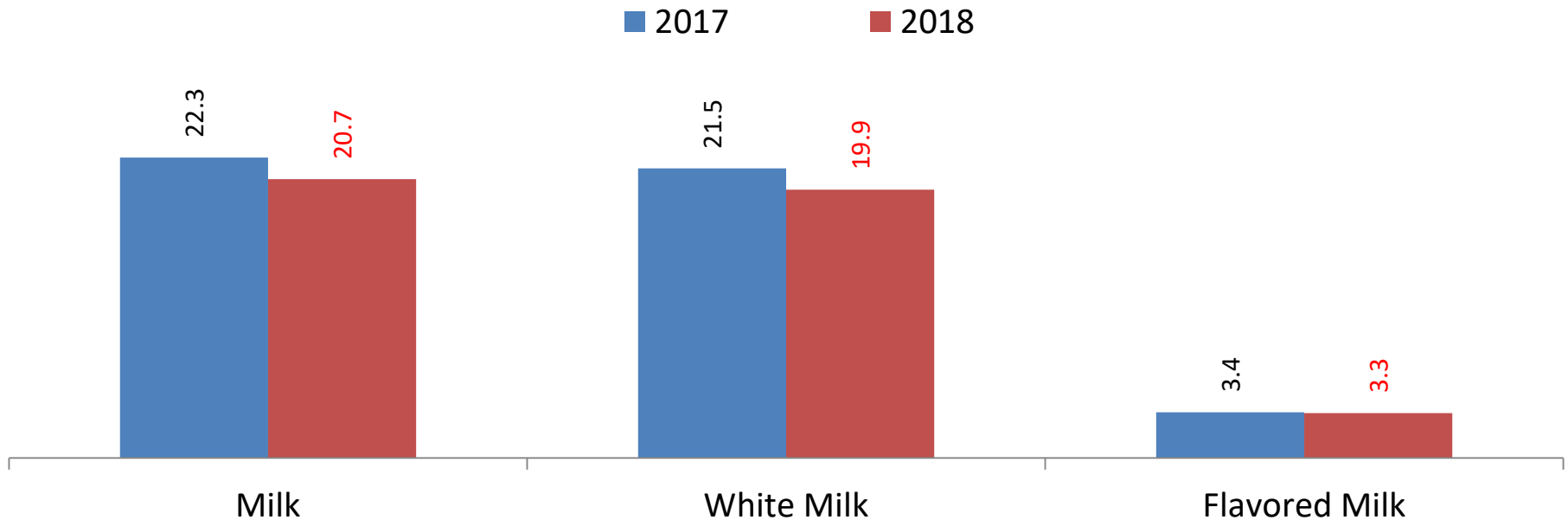


Buying Rate – Average number of gallons purchased annually at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Milk – Buying Rate

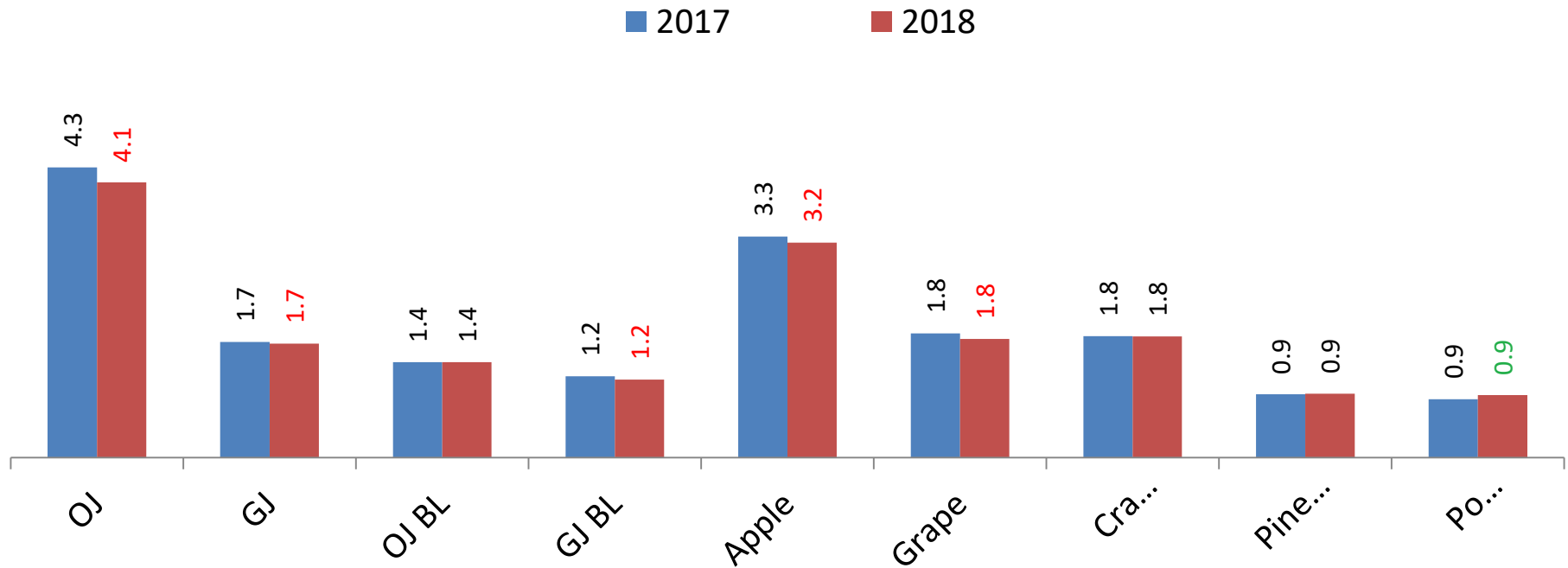


Buying Rate – Average number of gallons purchased annually at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



100% Juice – Buying Rate

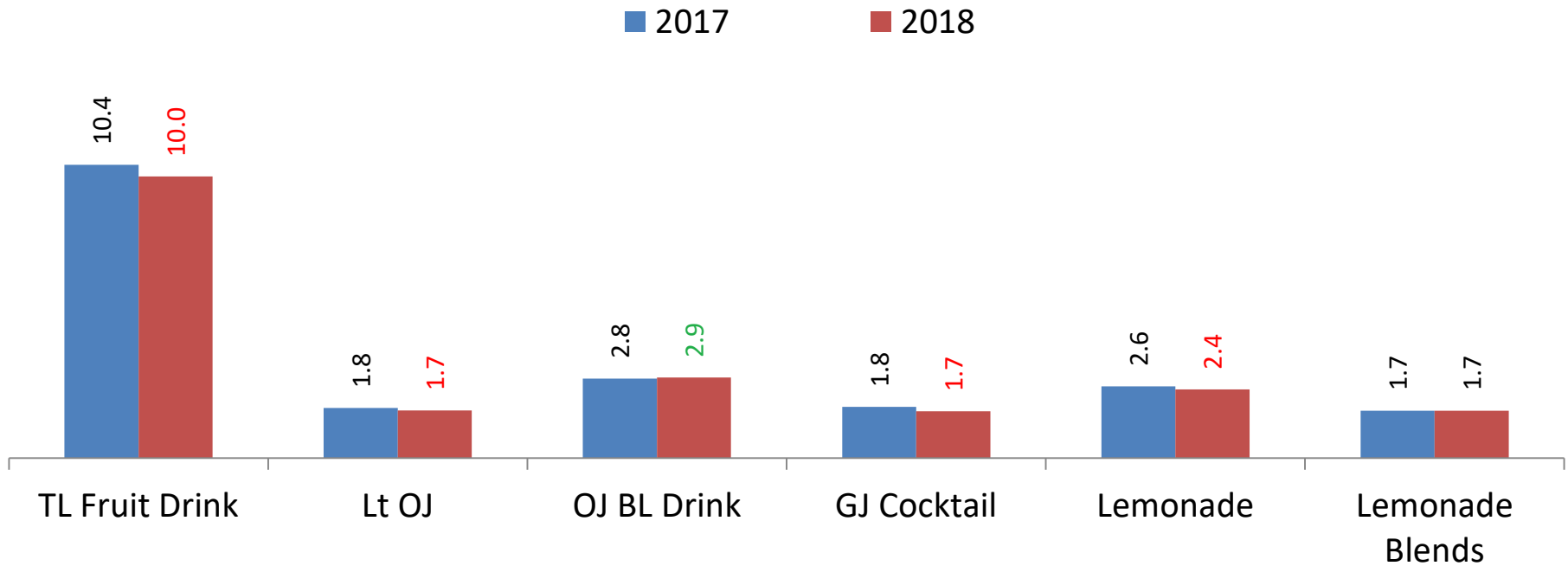


Buying Rate – Average number of gallons purchased annually at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Fruit Drink – Buying Rate

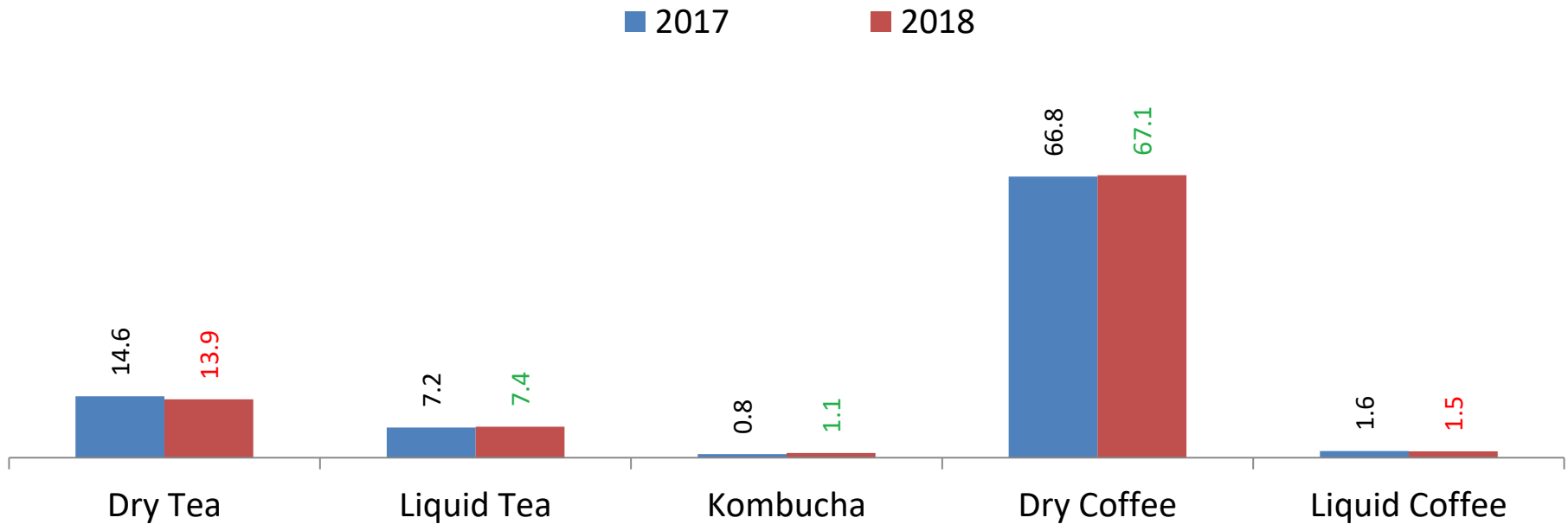


Buying Rate – Average number of gallons purchased annually at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Tea/Coffee – Buying Rate

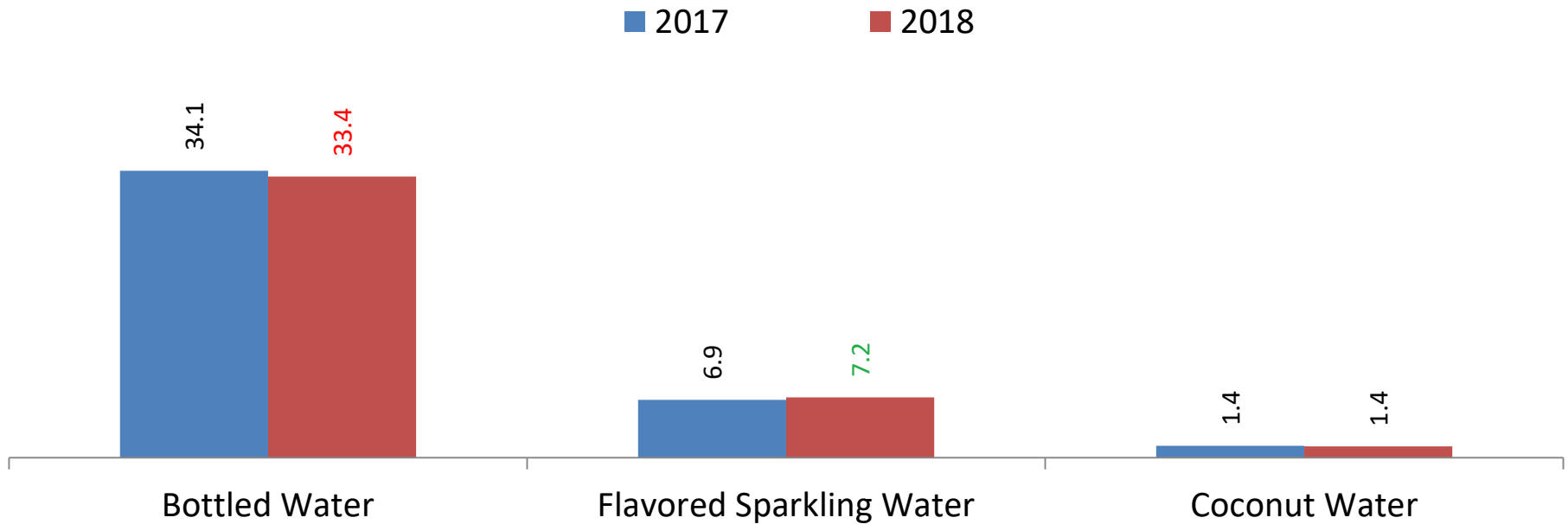


Buying Rate – Average number of gallons purchased annually at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Water – Buying Rate

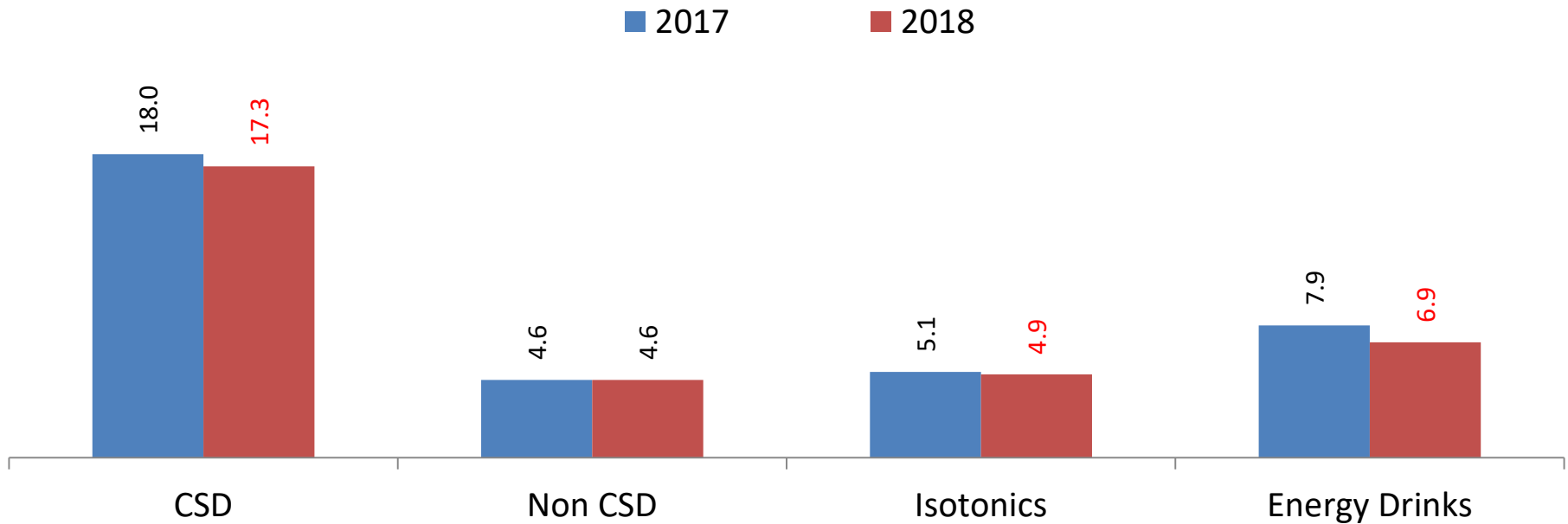


Buying Rate – Average number of gallons purchased annually at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Soft Drink – Purchase Frequency

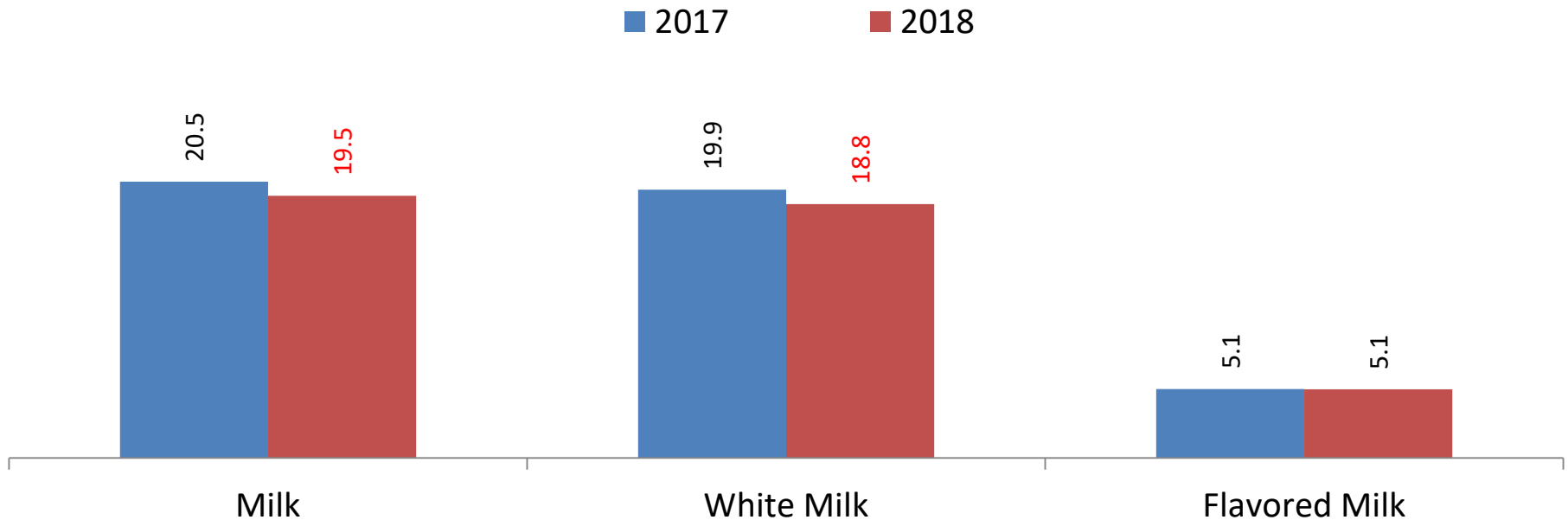


Purchase Frequency – Average number of times per year product was purchased at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Milk – Purchase Frequency

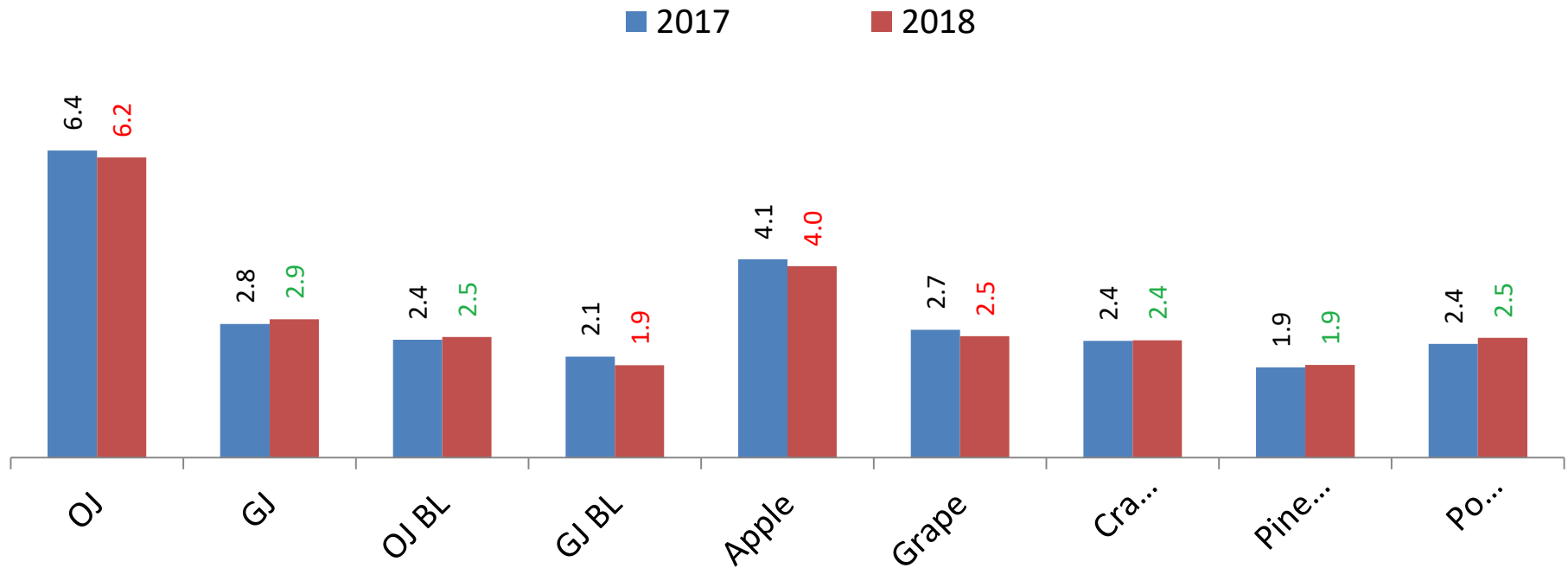


Purchase Frequency – Average number of times per year product was purchased at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



100% Juice – Purchase Frequency

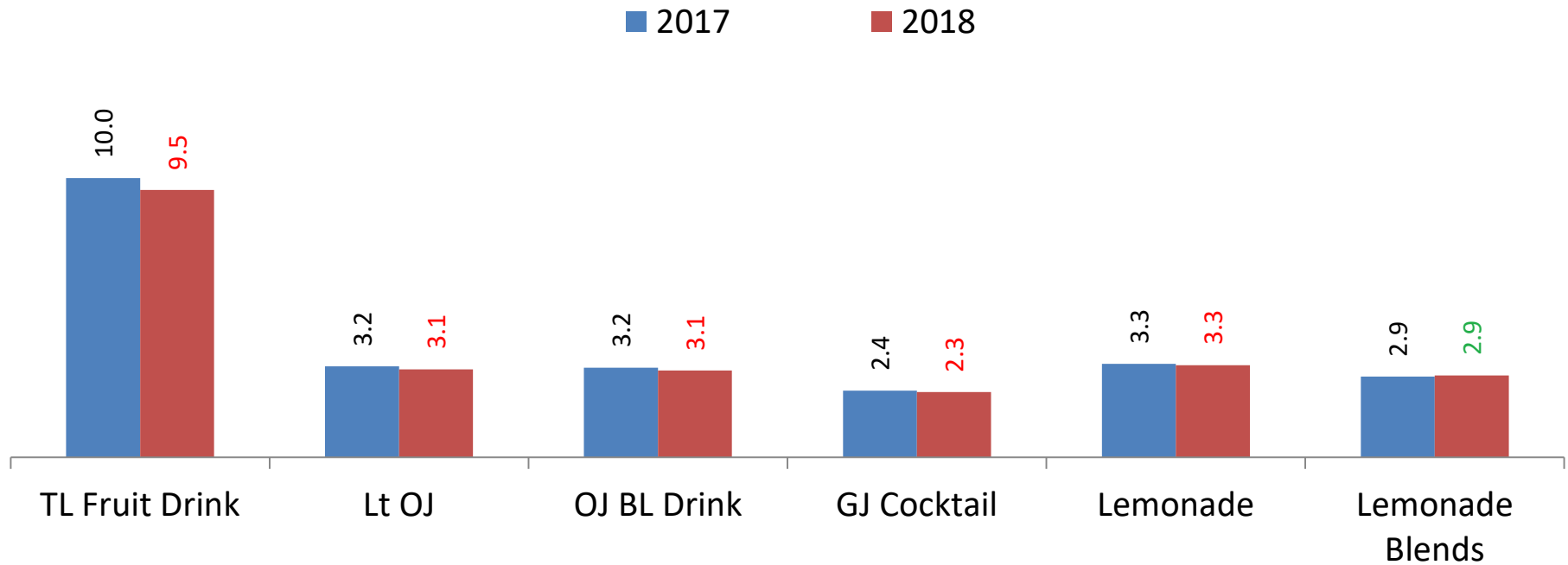


Purchase Frequency – Average number of times per year product was purchased at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Fruit Drink – Purchase Frequency

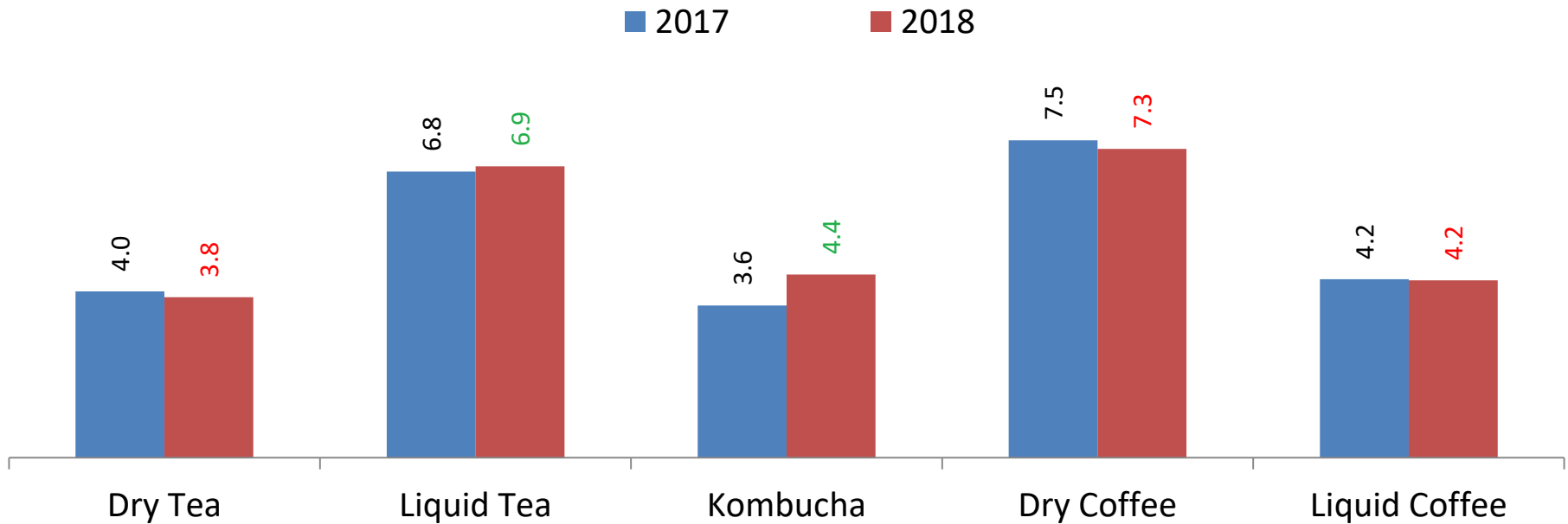


Purchase Frequency – Average number of times per year product was purchased at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Tea/Coffee – Purchase Frequency

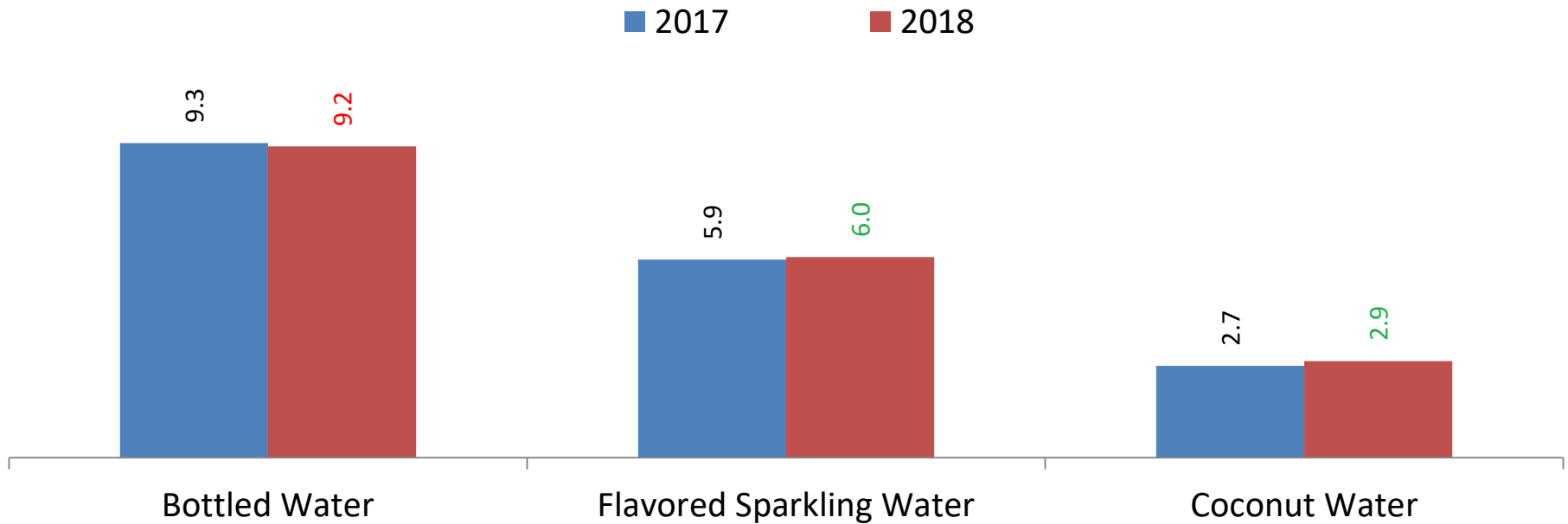


Purchase Frequency – Average number of times per year product was purchased at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Water – Purchase Frequency

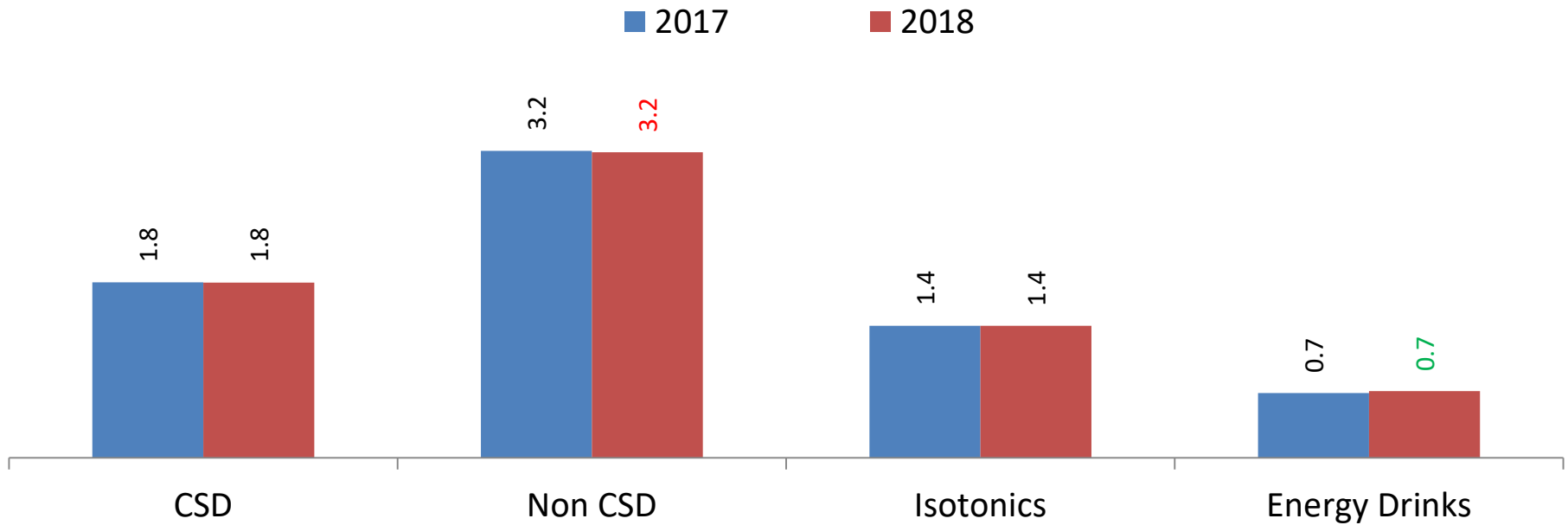


Purchase Frequency – Average number of times per year product was purchased at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Soft Drink – Purchase Size

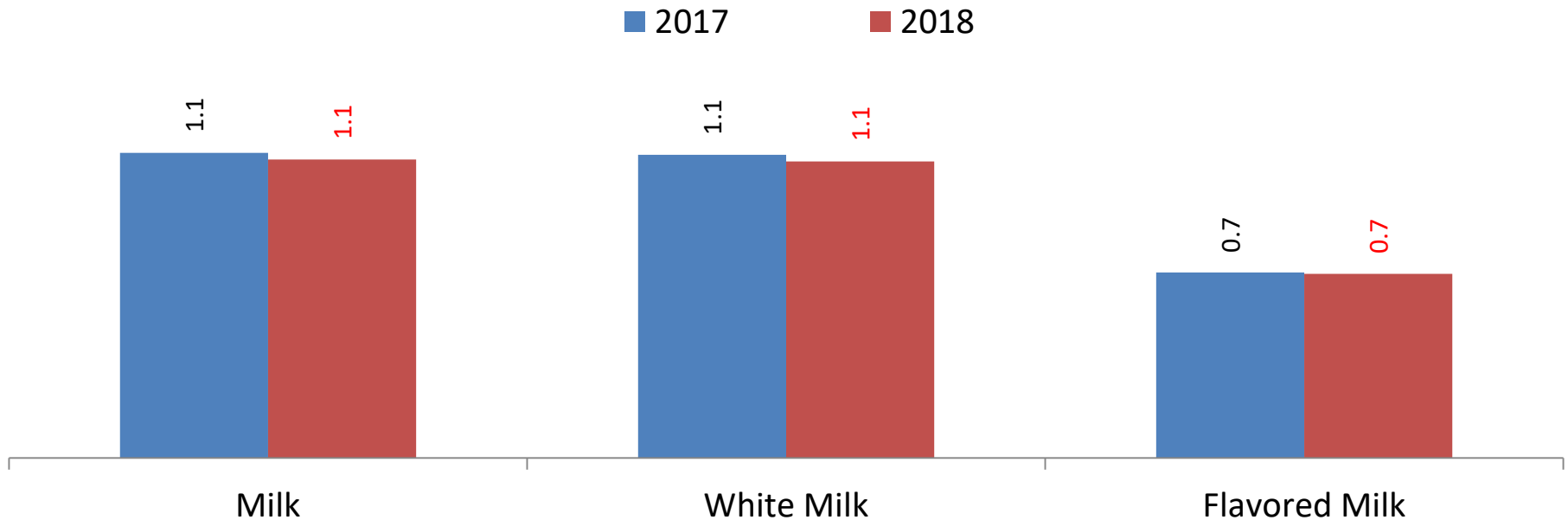


Purchase Size – Average amount (gallons) purchased every time product is purchased at retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



Milk – Purchase Size

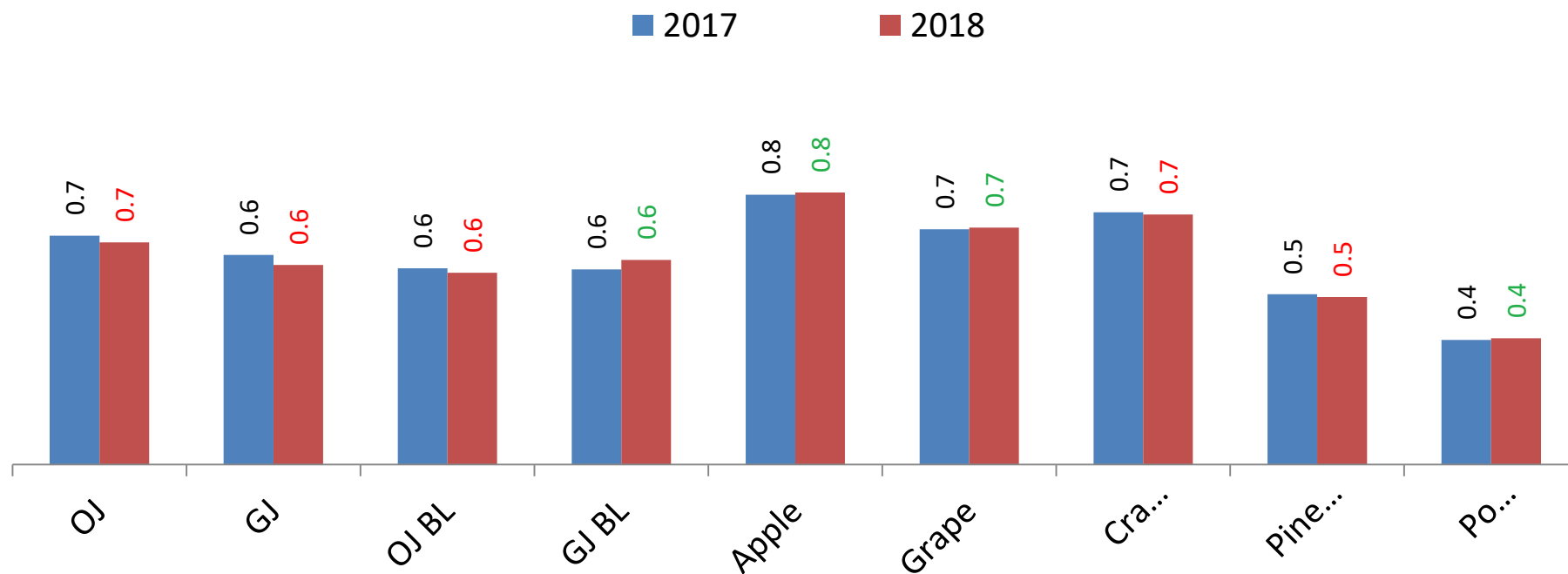


Purchase Size – Average amount (gallons) purchased every time product is purchased at retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



100% Juice – Purchase Size

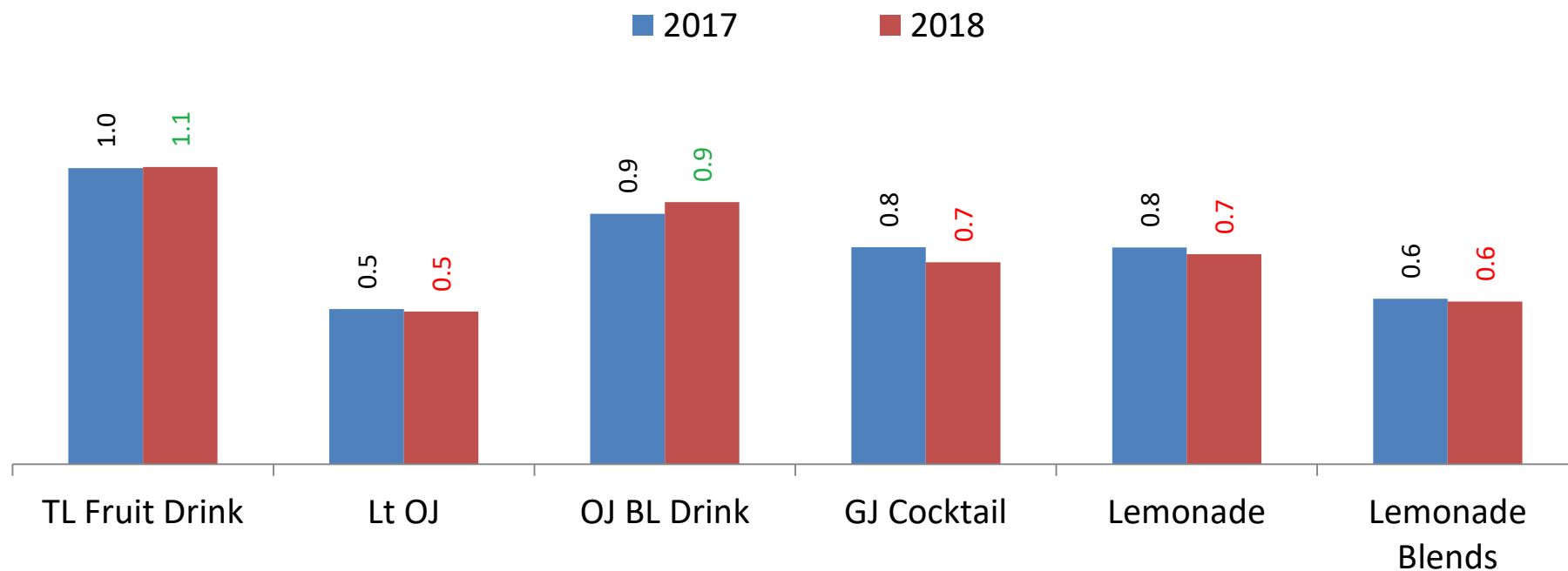


Purchase Size – Average amount (gallons) purchased every time product is purchased at retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



Fruit Drink – Purchase Size

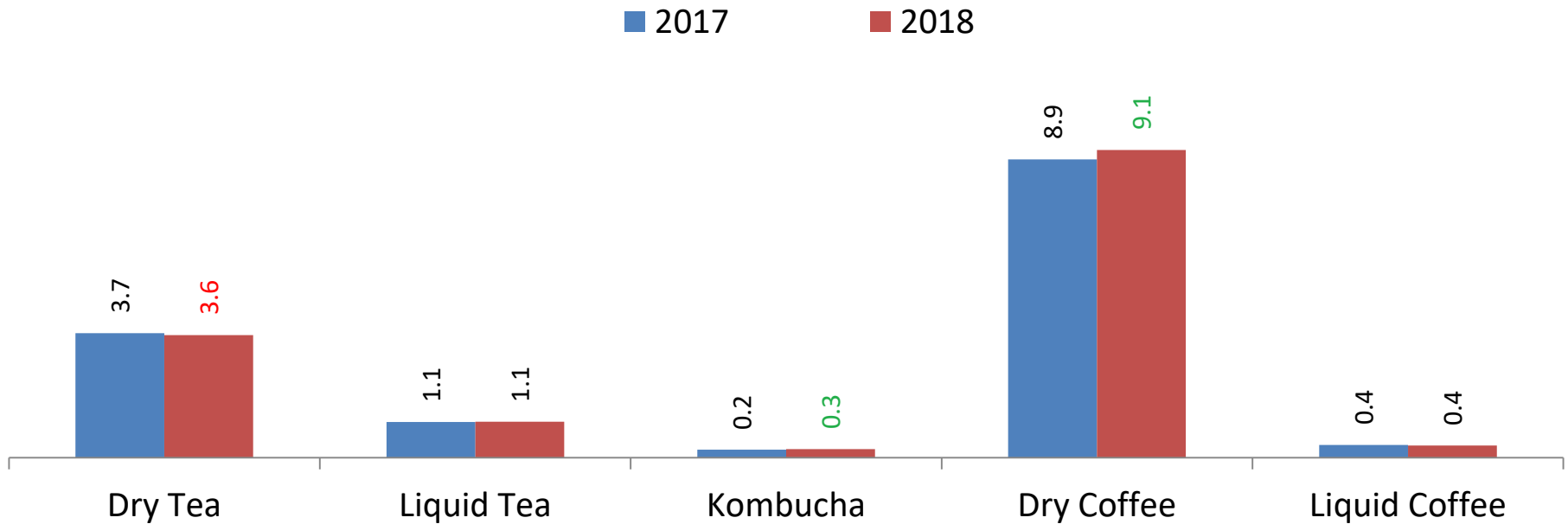


Purchase Size – Average amount (gallons) purchased every time product is purchased at retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



Tea/Coffee – Purchase Size

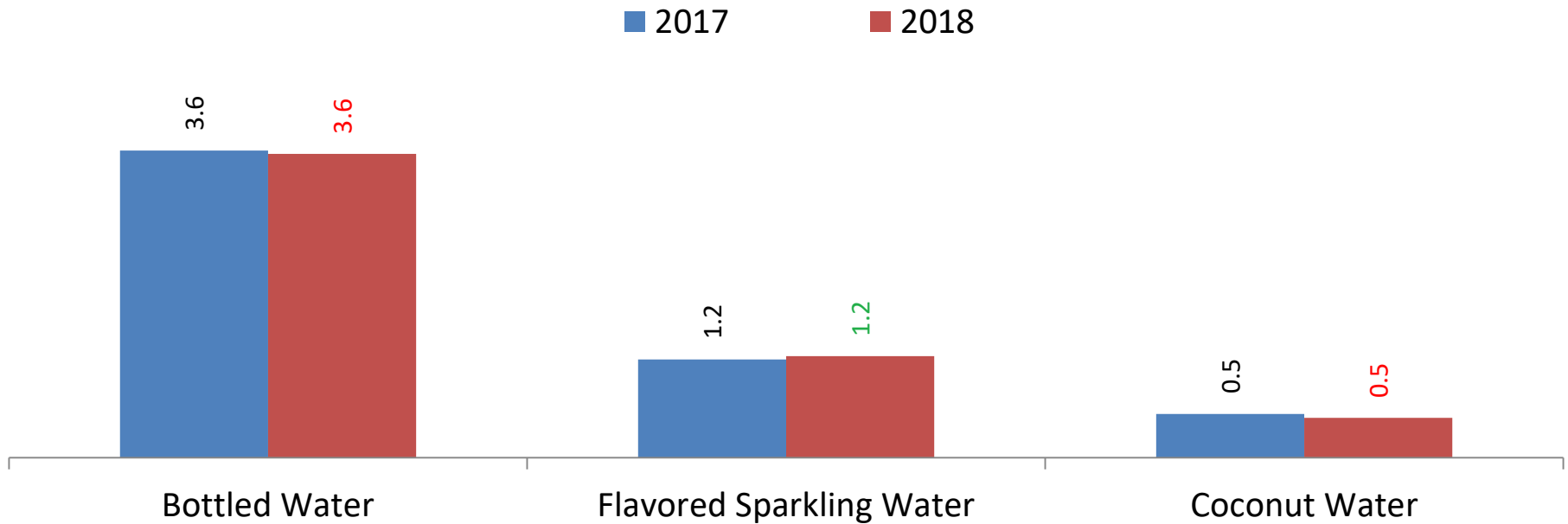


Purchase Size – Average amount (gallons) purchased every time product is purchased at retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



Water – Purchase Size

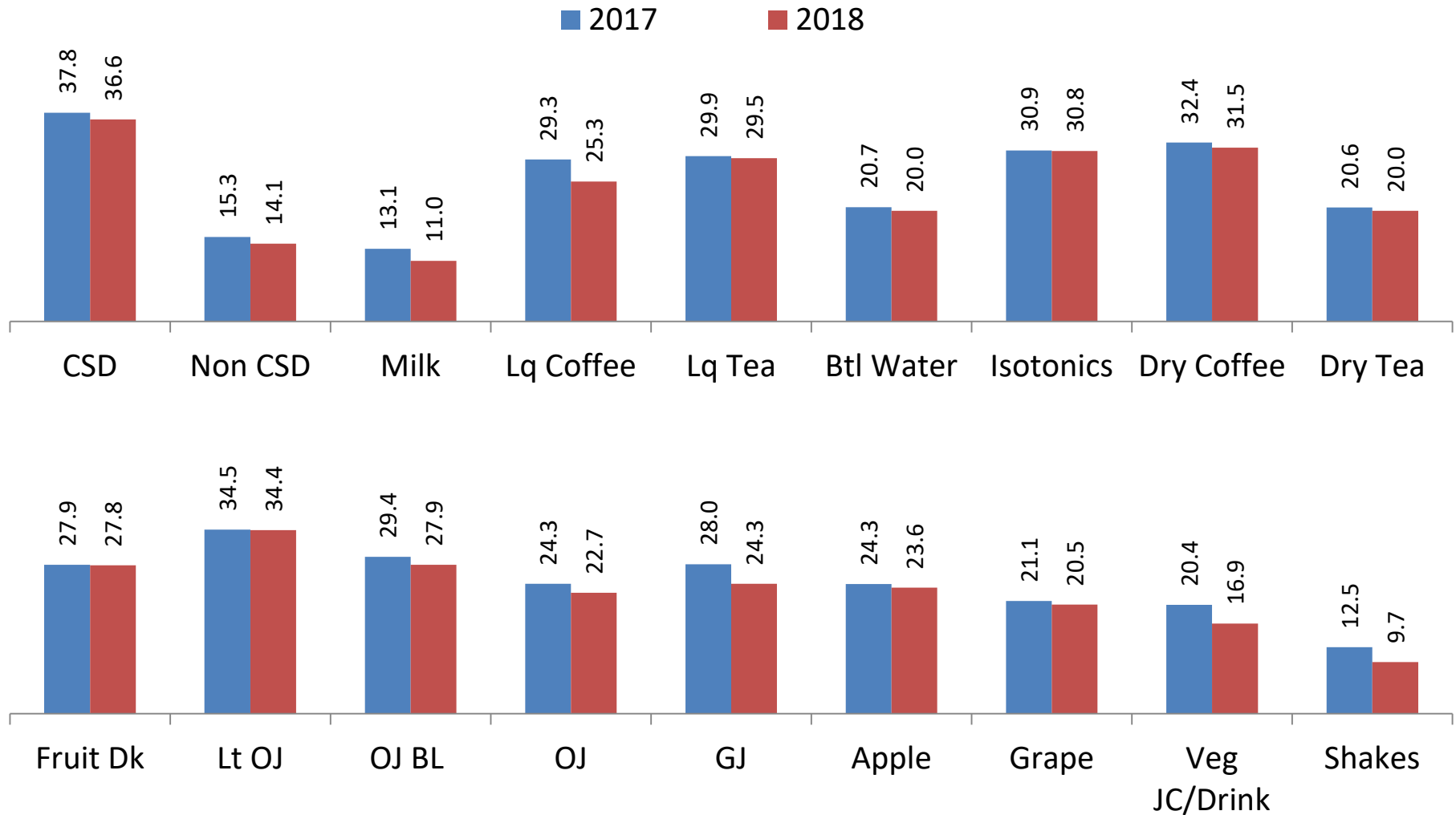


Purchase Size – Average amount (gallons) purchased every time product is purchased at retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



Beverages – % Purchased on Any Perceived Deal

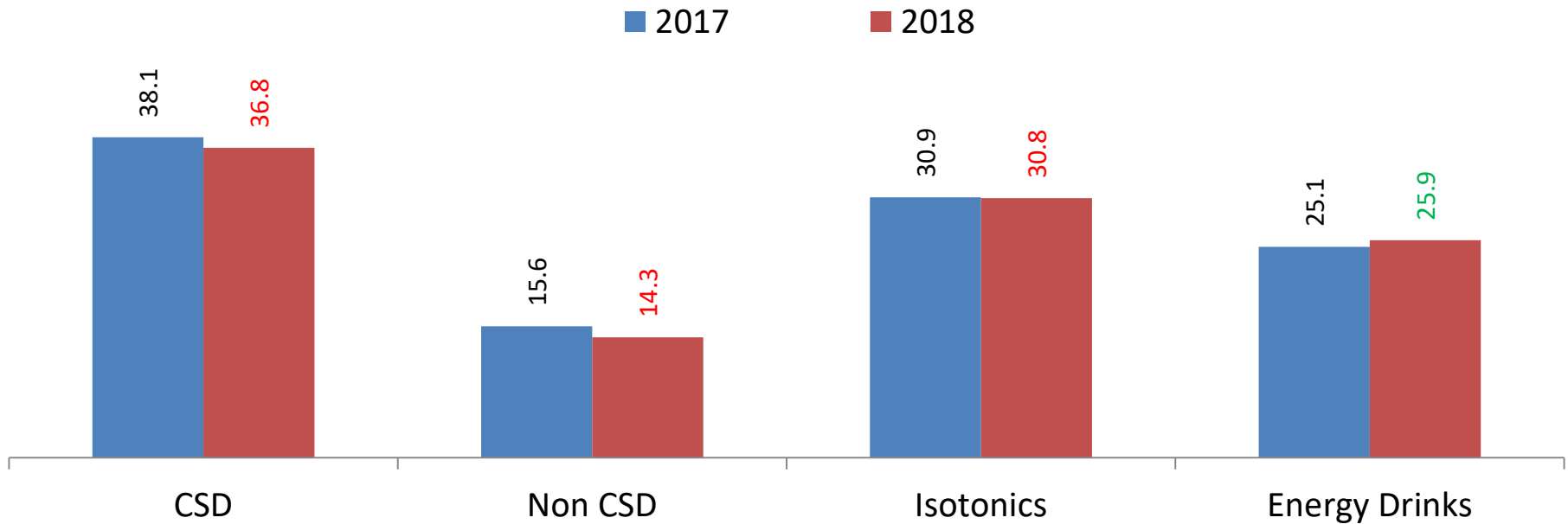


% Purchased on Perceived Deal – Percent of product bought at retail when Buyer thought it was on deal (coupon, shelf discount, etc.)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Soft Drink – % Purchased on Any Perceived Deal

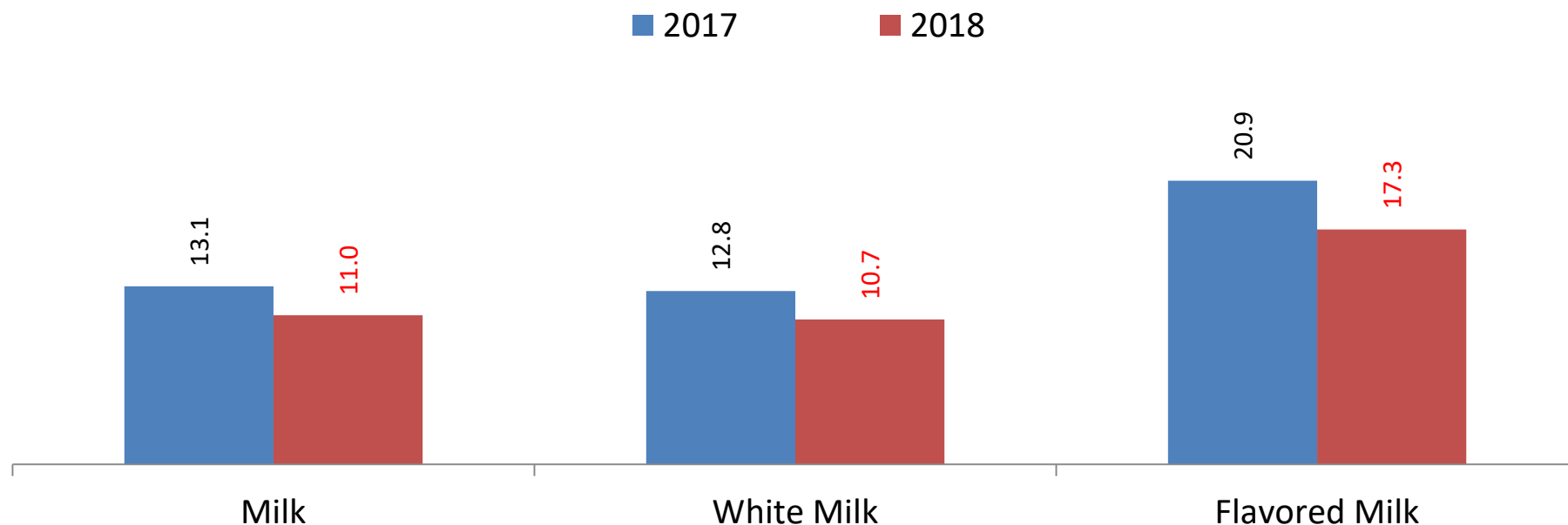


% Purchased on Perceived Deal – Percent of product bought at retail when Buyer thought it was on deal (coupon, shelf discount, etc.)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Milk – % Purchased on Any Perceived Deal

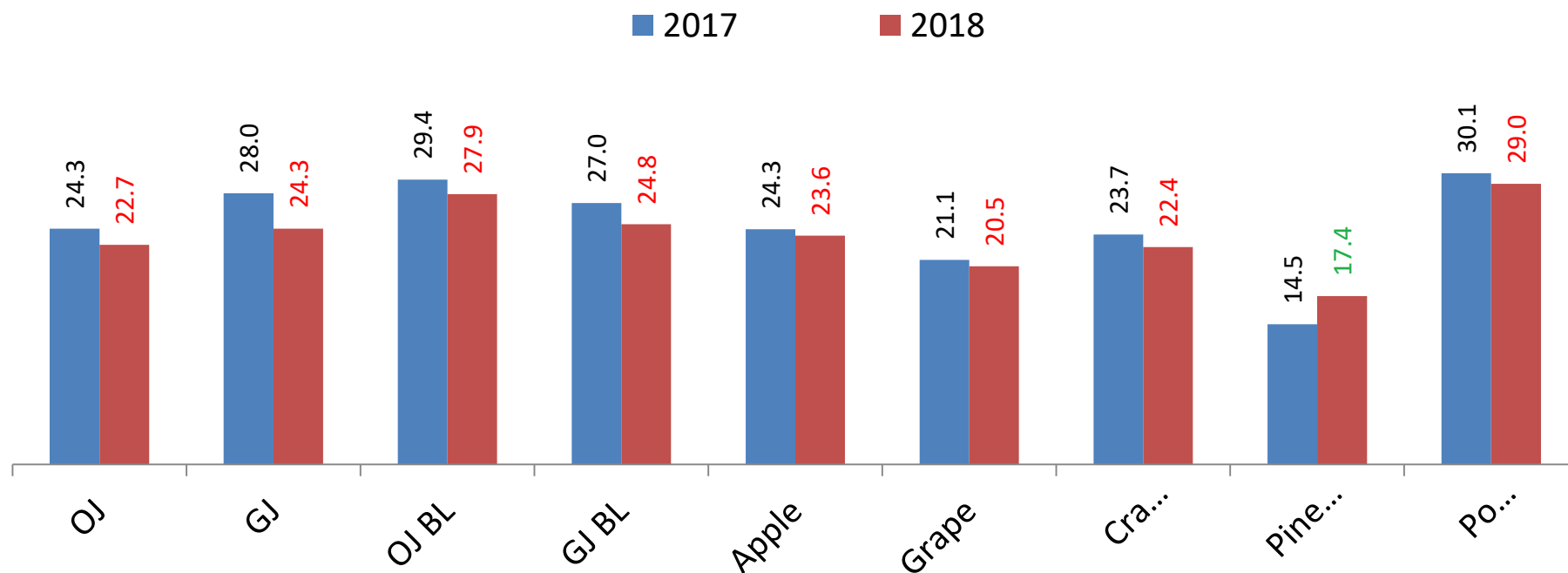


% Purchased on Perceived Deal – Percent of product bought at retail when Buyer thought it was on deal (coupon, shelf discount, etc.)

Source: Nielsen Homescan™ data for Y/E Dec 2018



100% Juice – % Purchased on Any Perceived Deal

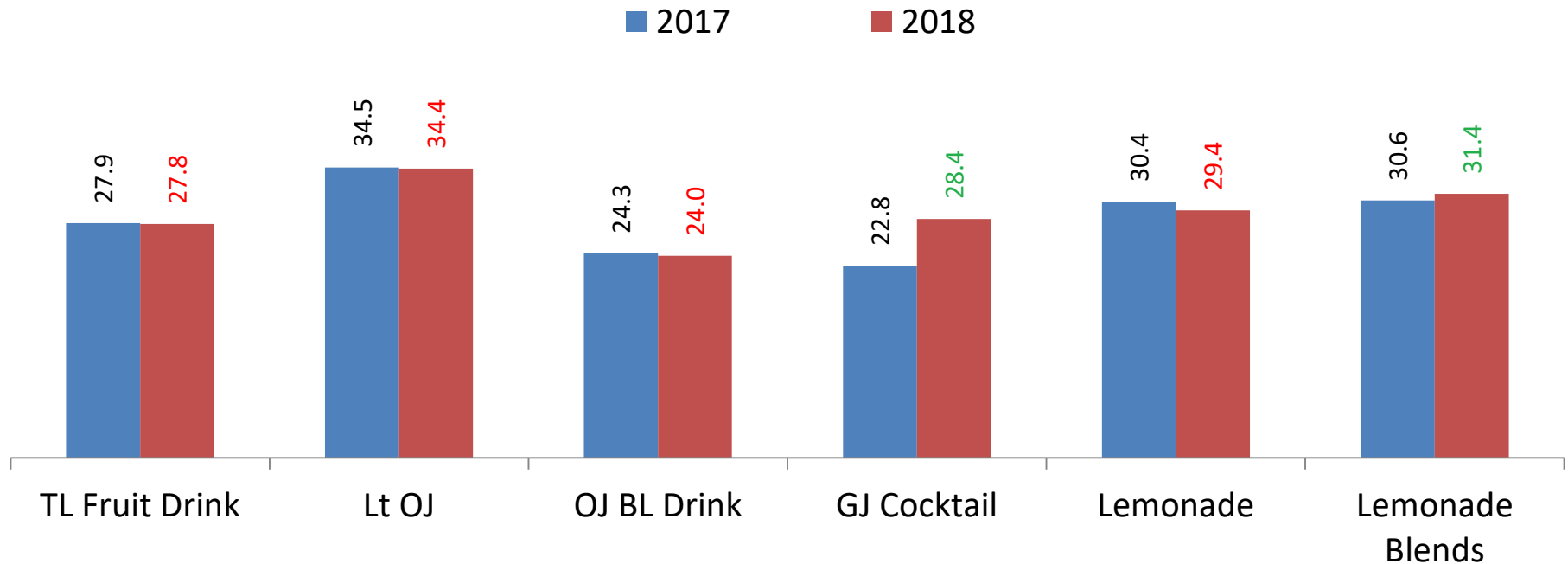


% Purchased on Perceived Deal – Percent of product bought at retail when Buyer thought it was on deal (coupon, shelf discount, etc.)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Fruit Drink – % Purchased on Any Perceived Deal

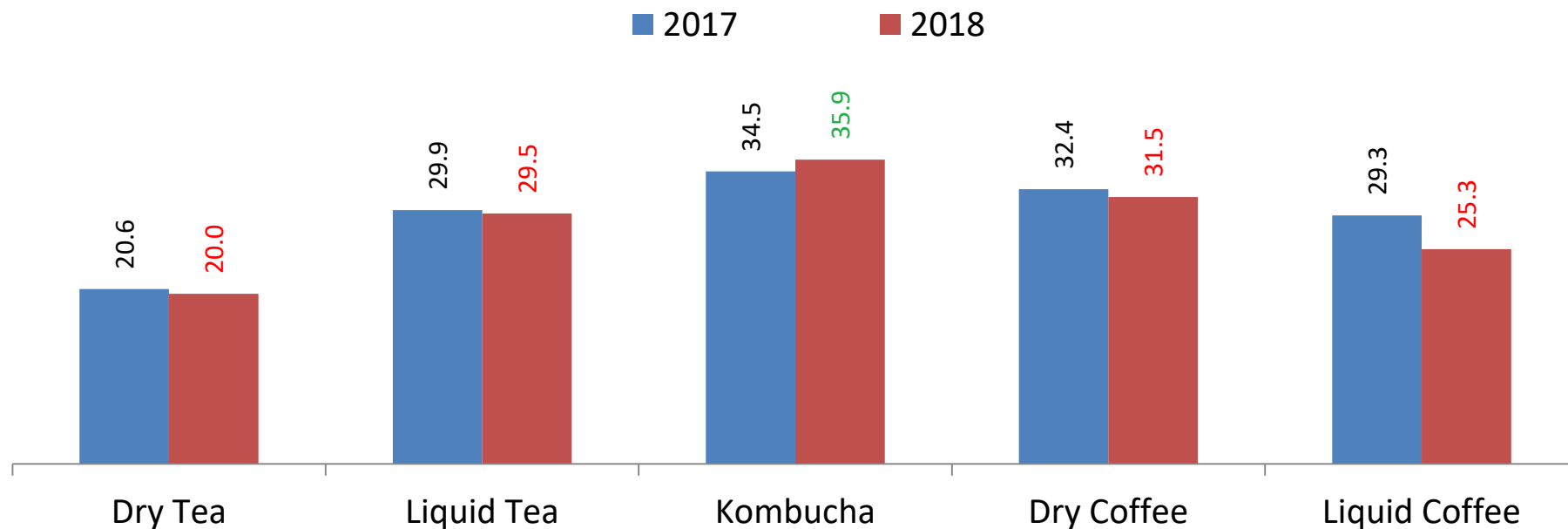


% Purchased on Perceived Deal – Percent of product bought at retail when Buyer thought it was on deal (coupon, shelf discount, etc.)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Tea/Coffee – % Purchased on Any Perceived Deal

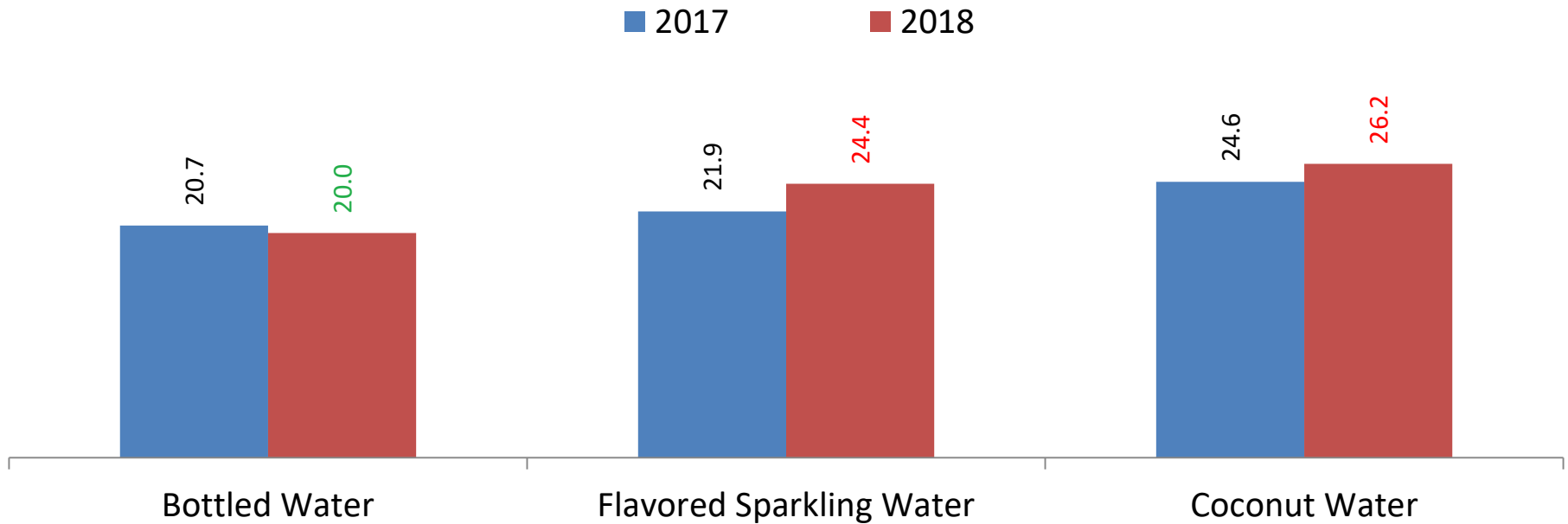


% Purchased on Perceived Deal – Percent of product bought at retail when Buyer thought it was on deal (coupon, shelf discount, etc.)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Water – % Purchased on Any Perceived Deal



% Purchased on Perceived Deal – Percent of product bought at retail when Buyer thought it was on deal (coupon, shelf discount, etc.)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Orange Juice Purchasing Review



Orange Juice

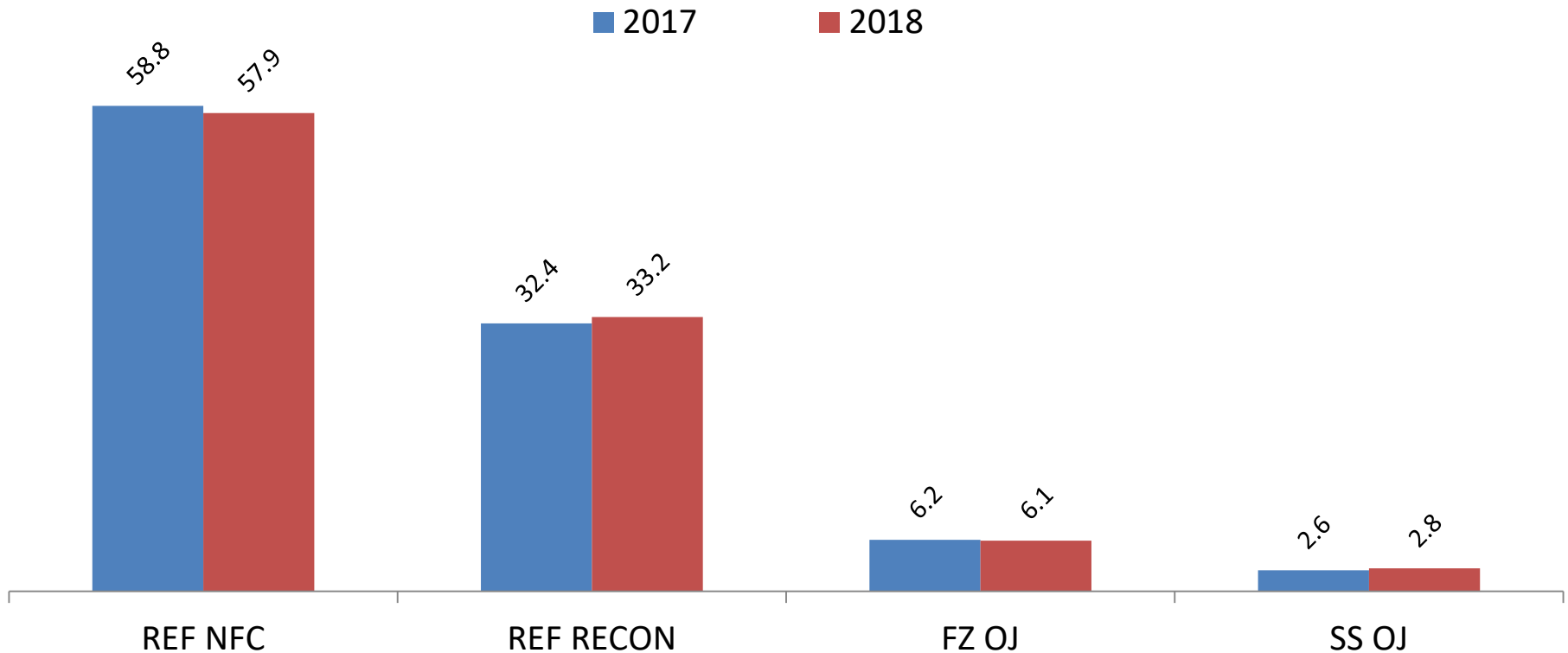
Historic Household Purchasing Trends

Year	Household Penetration	Buying Rate	Purchase Frequency	% Purchased on Perceived Deal
2009	70.2	6.4	8.2	32
2010	68.6	5.9	7.9	31
2011	67.4	5.7	7.7	31
2012	65.1	5.6	7.7	30
2013	64.9	5.4	7.5	32
2014	62.4	5.2	7.3	31
2015	62.7	4.8	6.9	29
2016	61.3	4.6	6.6	28
2017	59.5	4.3	6.4	24
2018	56.9	4.1	6.2	23

Source: Nielsen Homescan Panel Data 2009-2018



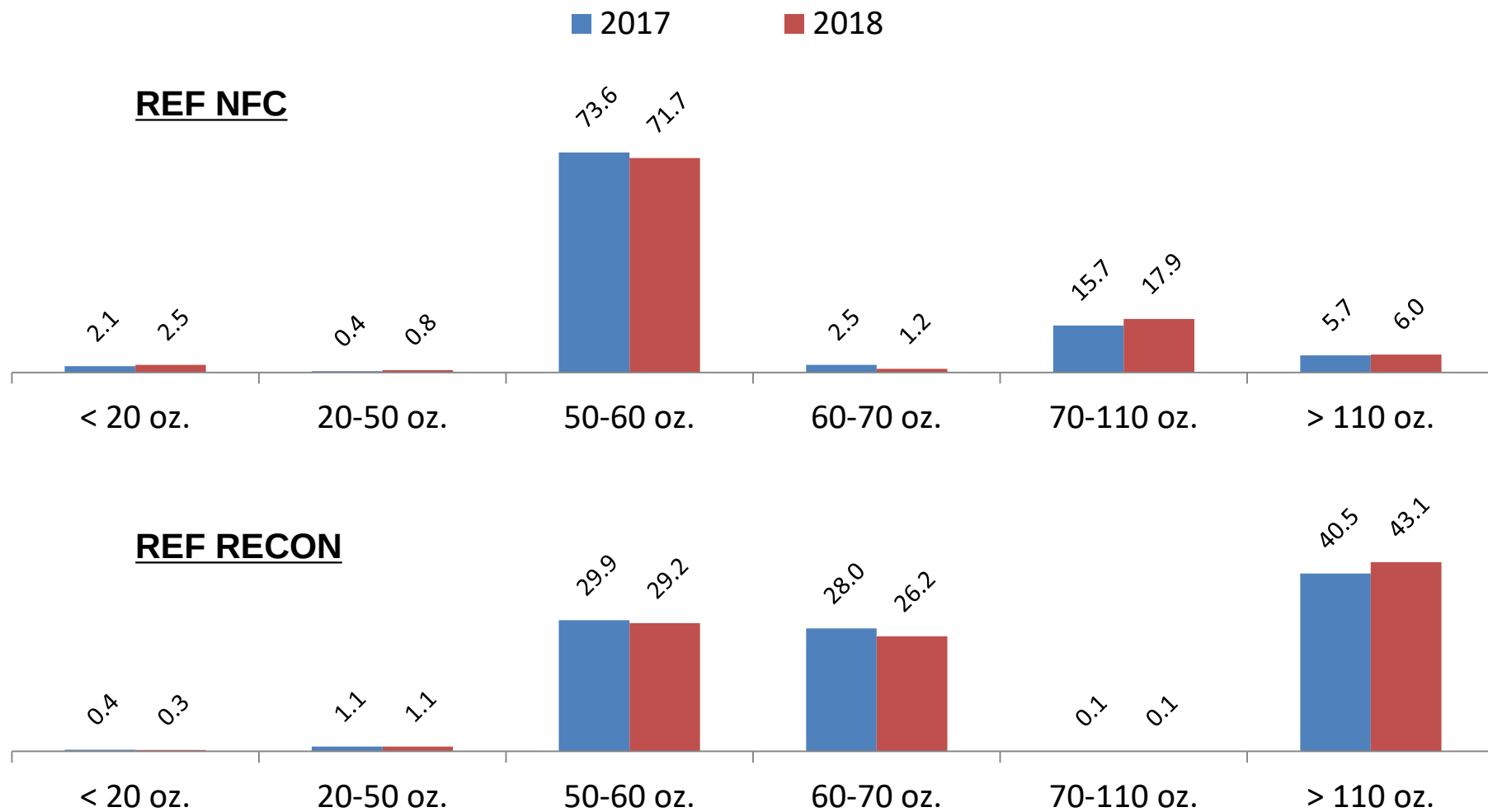
Orange Juice – Share by Type



Source: Nielsen Homescan™ data for Y/E Dec 2018



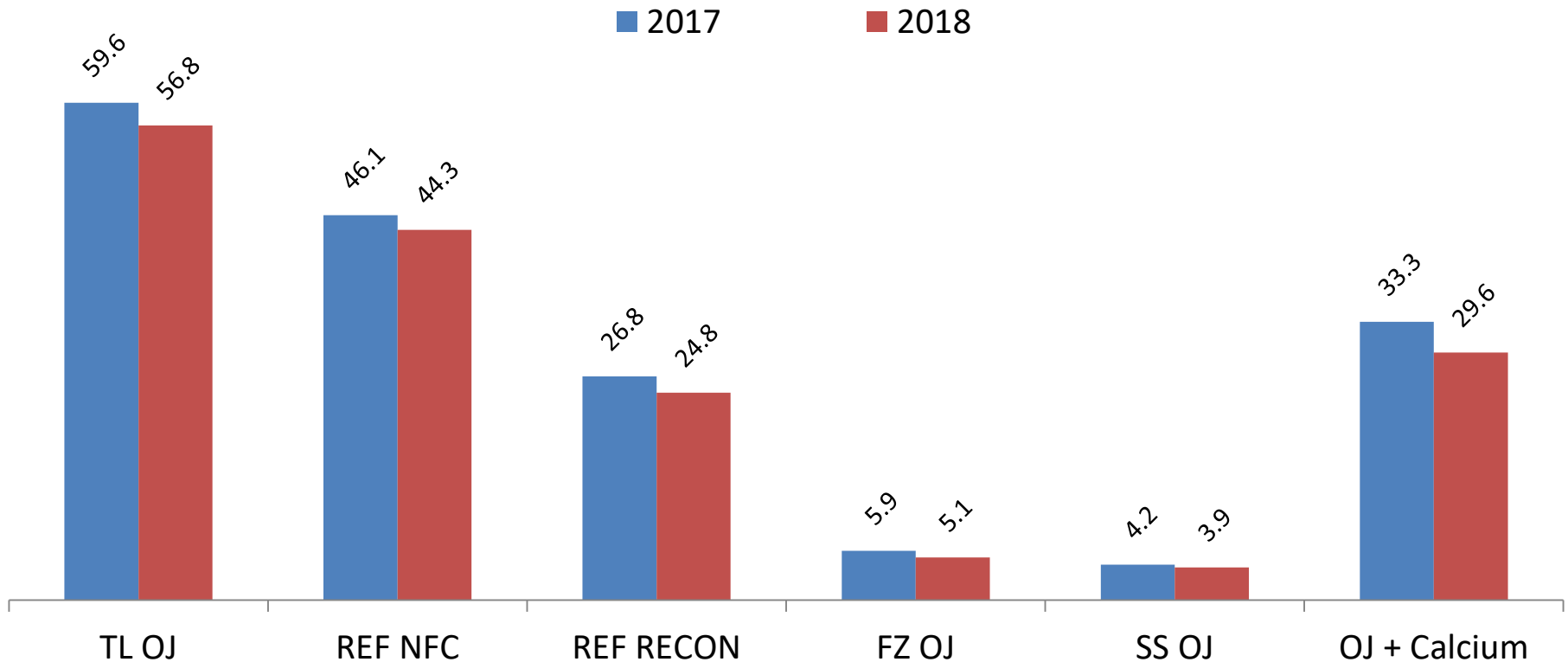
Orange Juice – Share by Size



Source: Nielsen Homescan™ data for Y/E Dec 2018



Orange Juice – Penetration

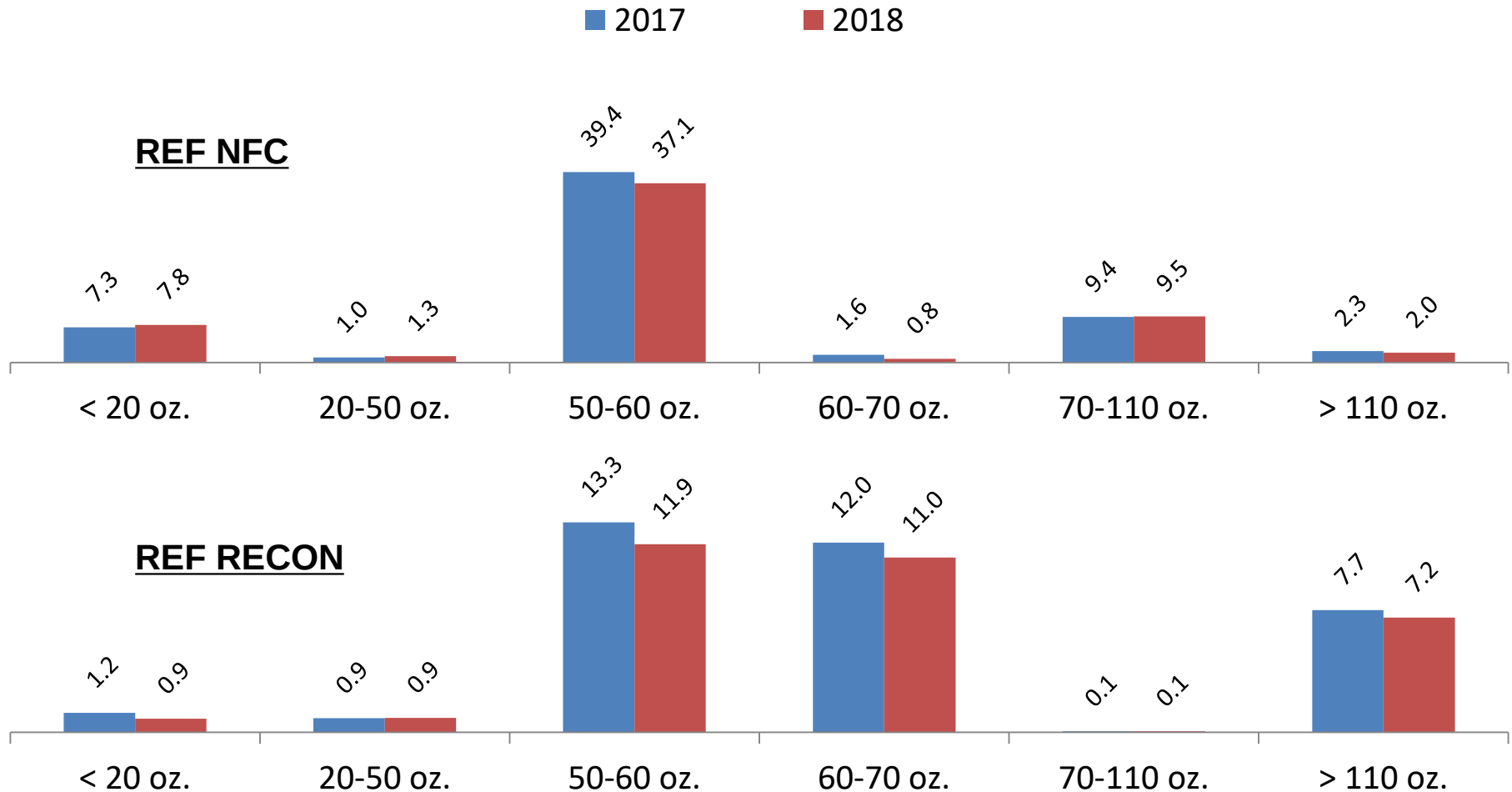


Household Penetration – Percentage of U.S. Households(HHs) buying product at Retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



Orange Juice – Penetration by Size

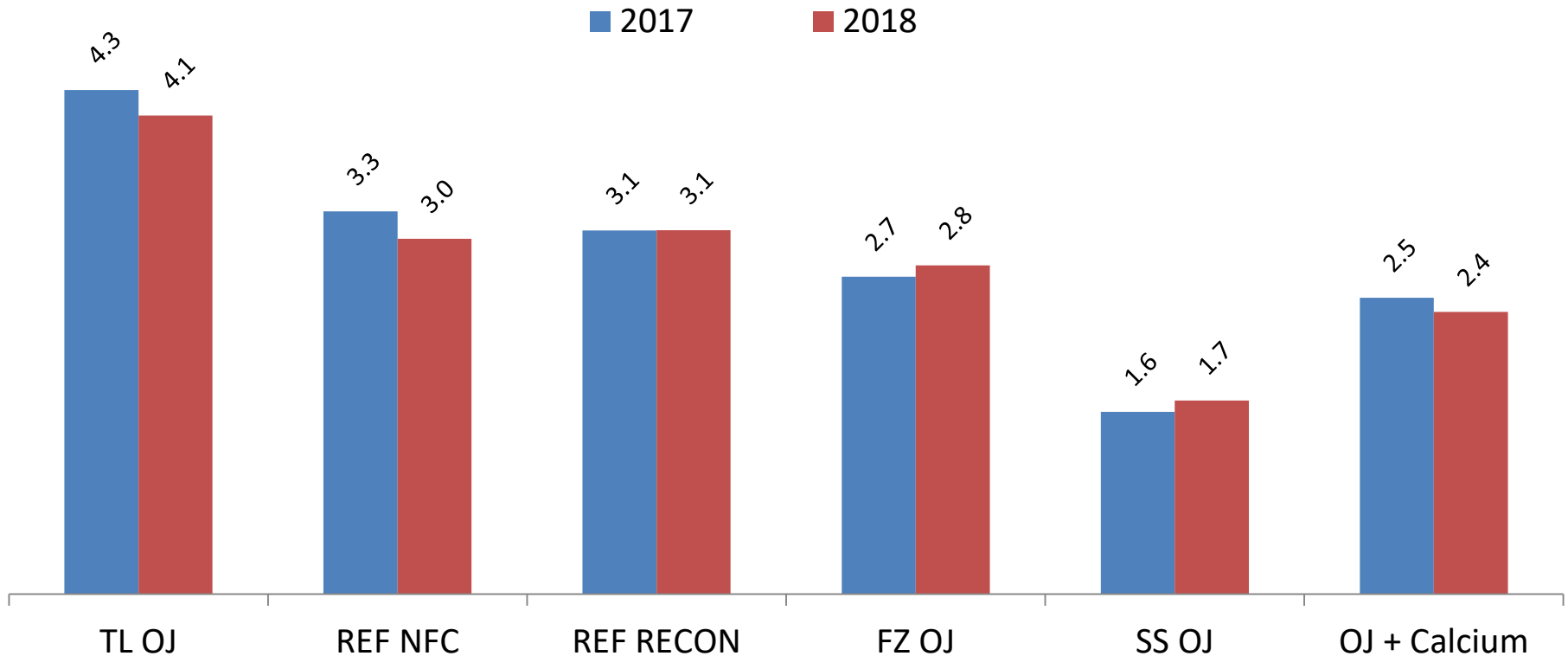


Household Penetration – Percentage of U.S. Households(HHs) buying product at Retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



Orange Juice – Buying Rate

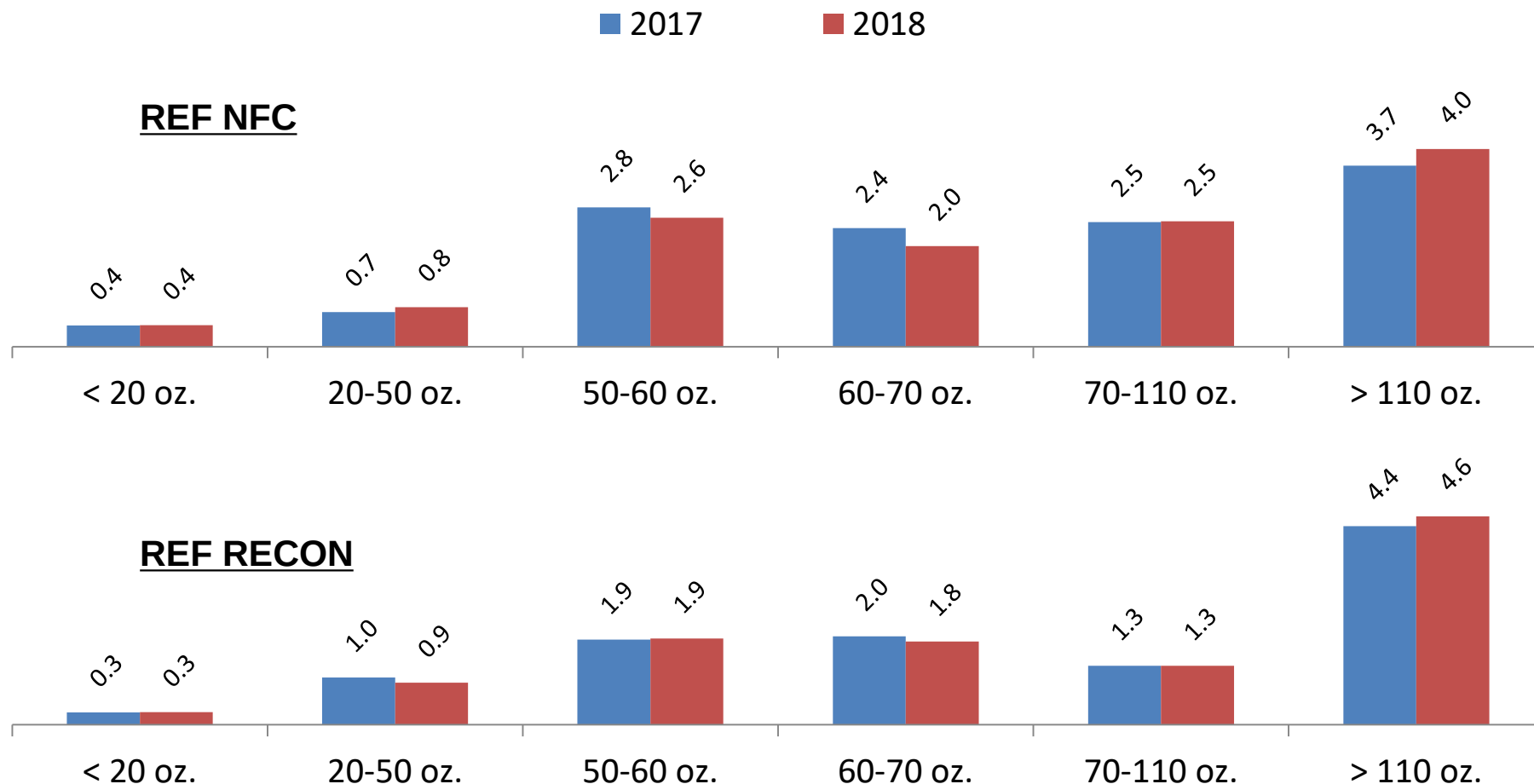


Buying Rate – Average number of gallons purchased annually at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Orange Juice – Buying Rate by Size

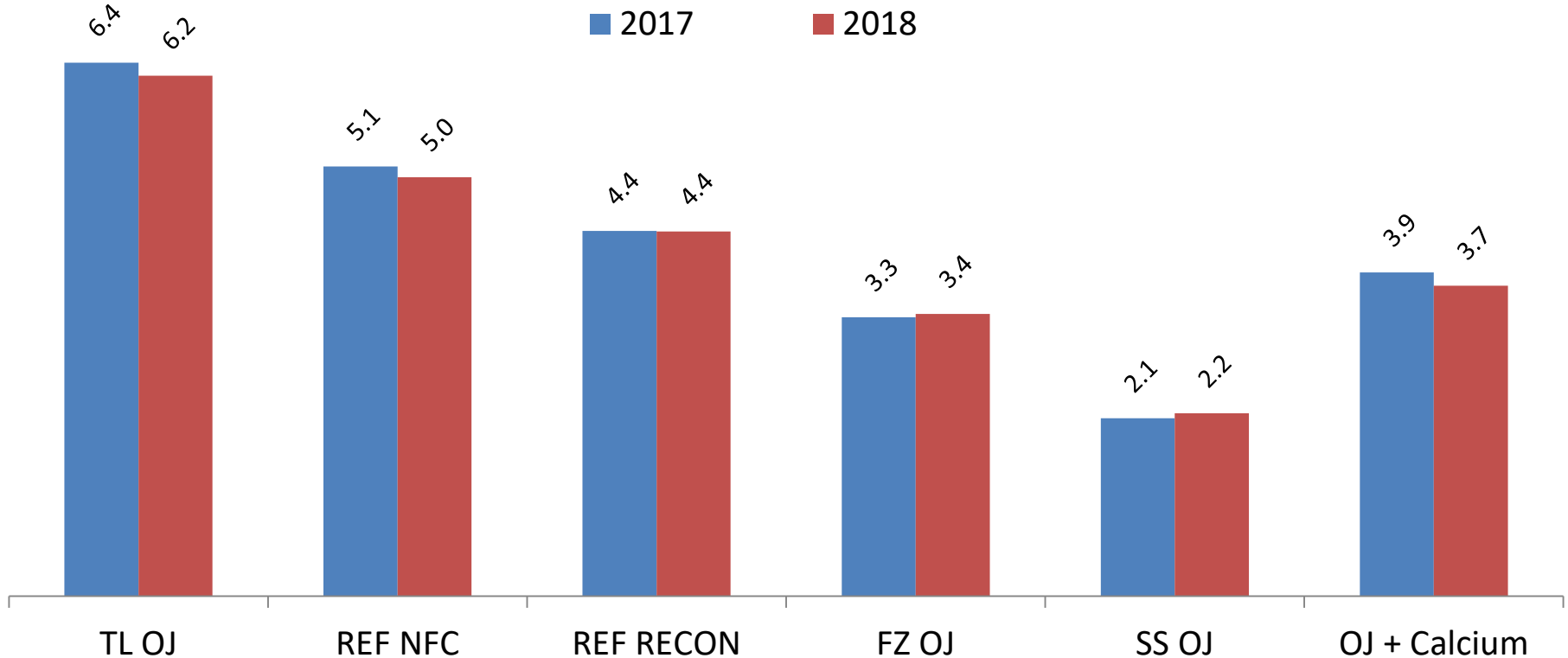


Buying Rate – Average number of gallons purchased annually at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Orange Juice – Purchase Frequency

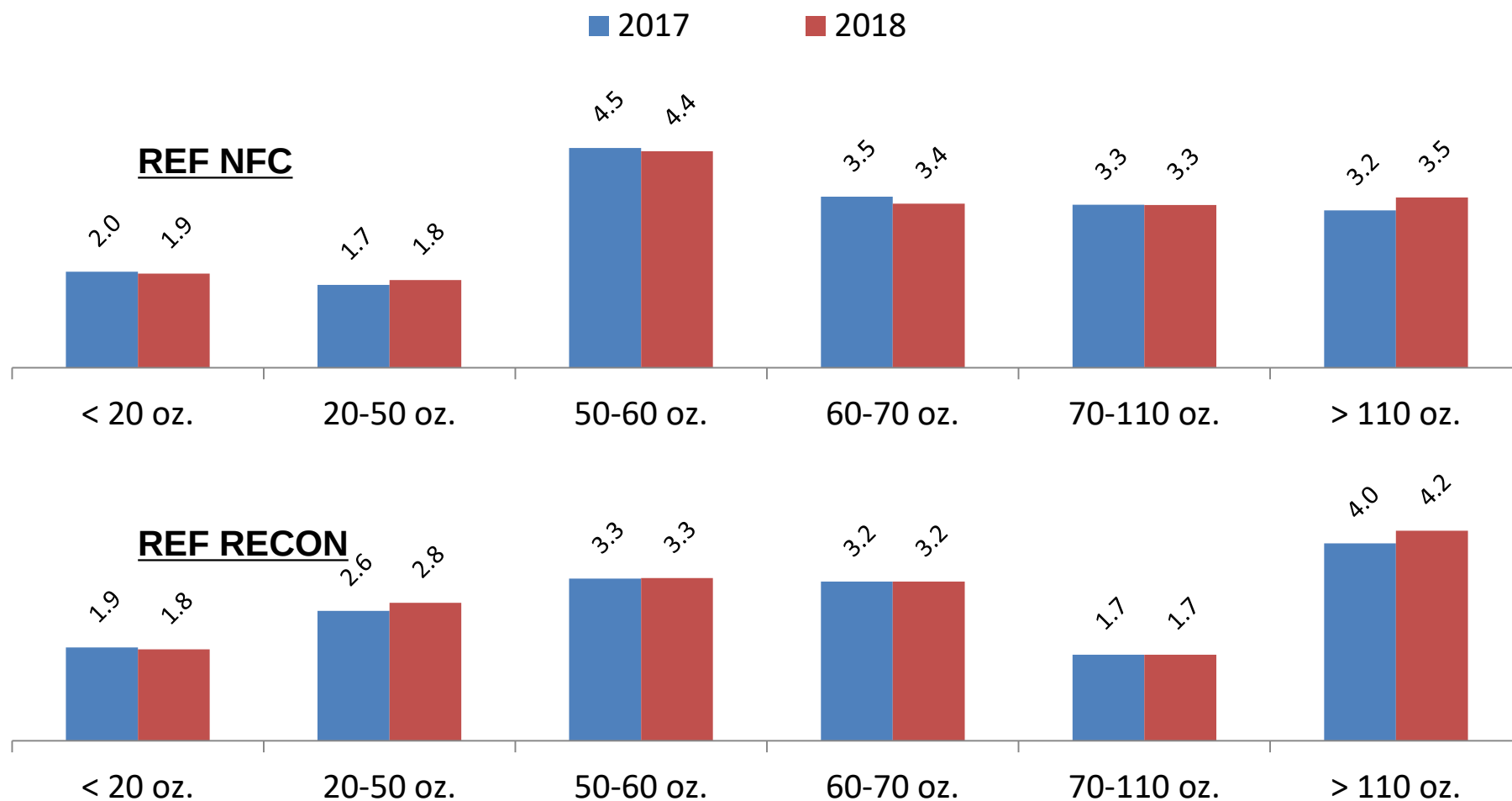


Purchase Frequency – Average number of times per year product was purchased at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Orange Juice – Purchase Frequency by Size

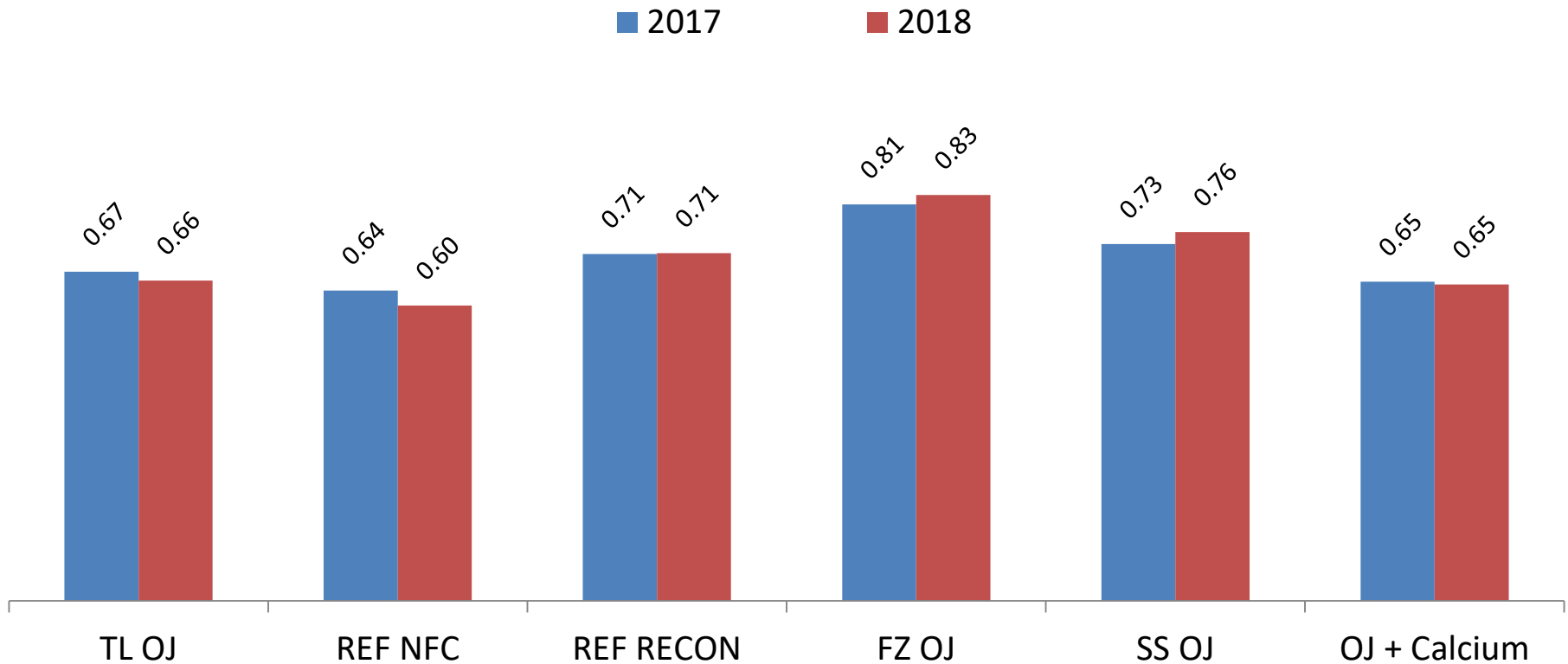


Purchase Frequency – Average number of times per year product was purchased at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Orange Juice – Purchase Size

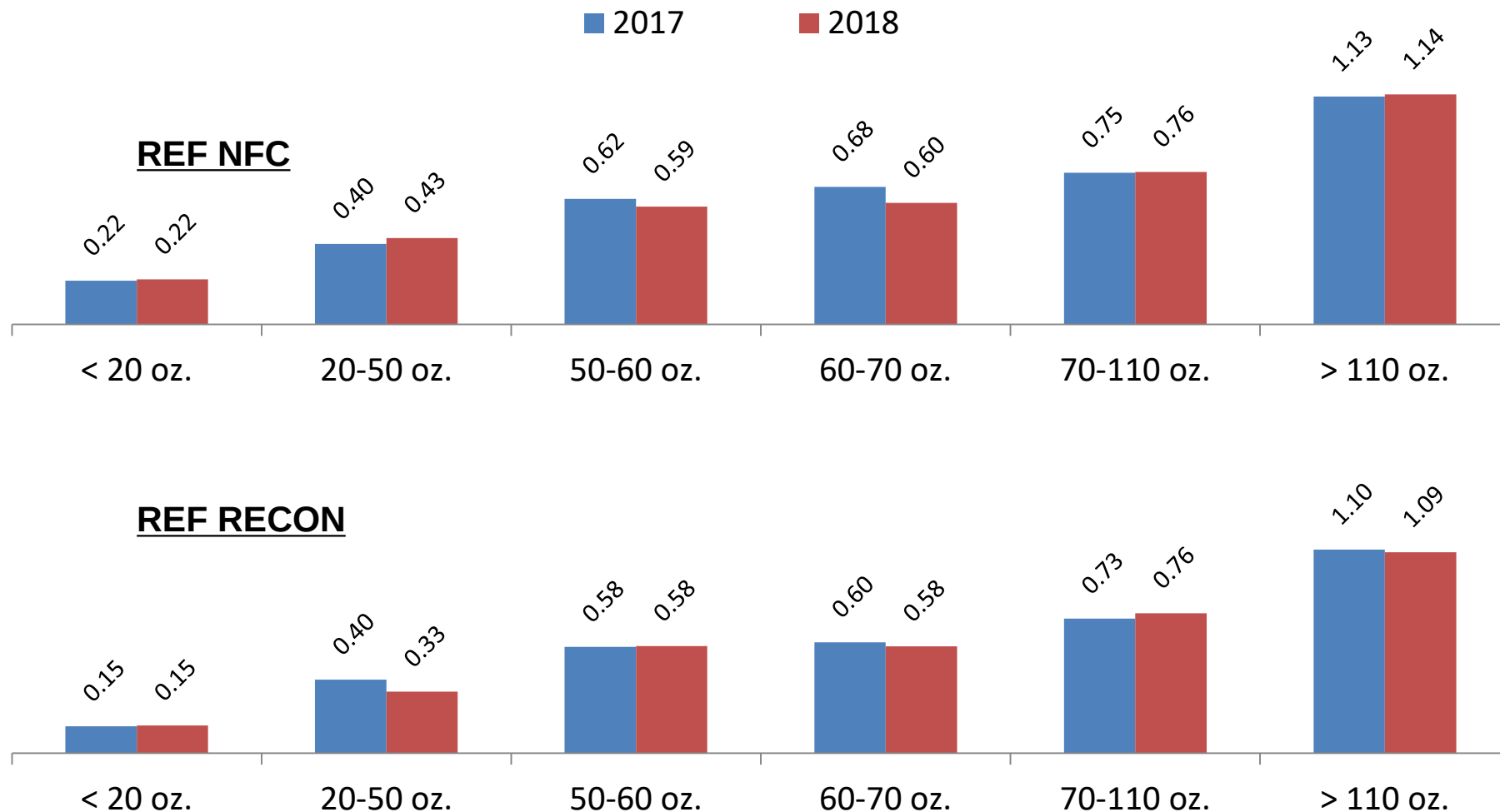


Purchase Size – Average amount (gallons) purchased every time product is purchased at retail

Source: Nielsen Homescan™ data for Y/E Dec 2018

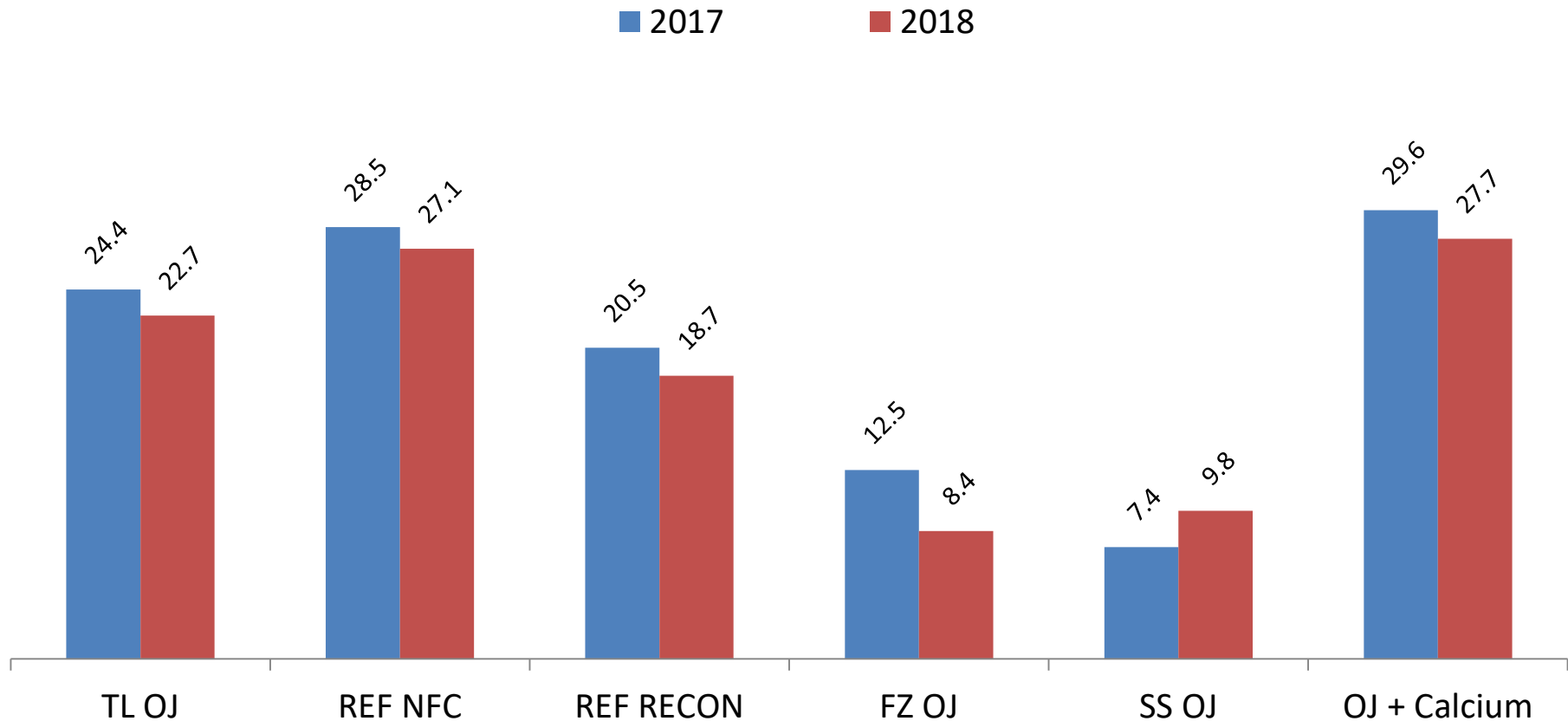


Orange Juice – Purchase Size by Size



Purchase Size – Average amount (gallons) purchased every time product is purchased at retail

Orange Juice – % Purchased on Any Perceived Deal



% Purchased on Perceived Deal – Percent of product bought at retail when Buyer thought it was on deal (coupon, shelf discount, etc.)

Source: Nielsen Homescan™ data for Y/E Dec 2018



Grapefruit Juice Purchasing Review



Grapefruit Juice

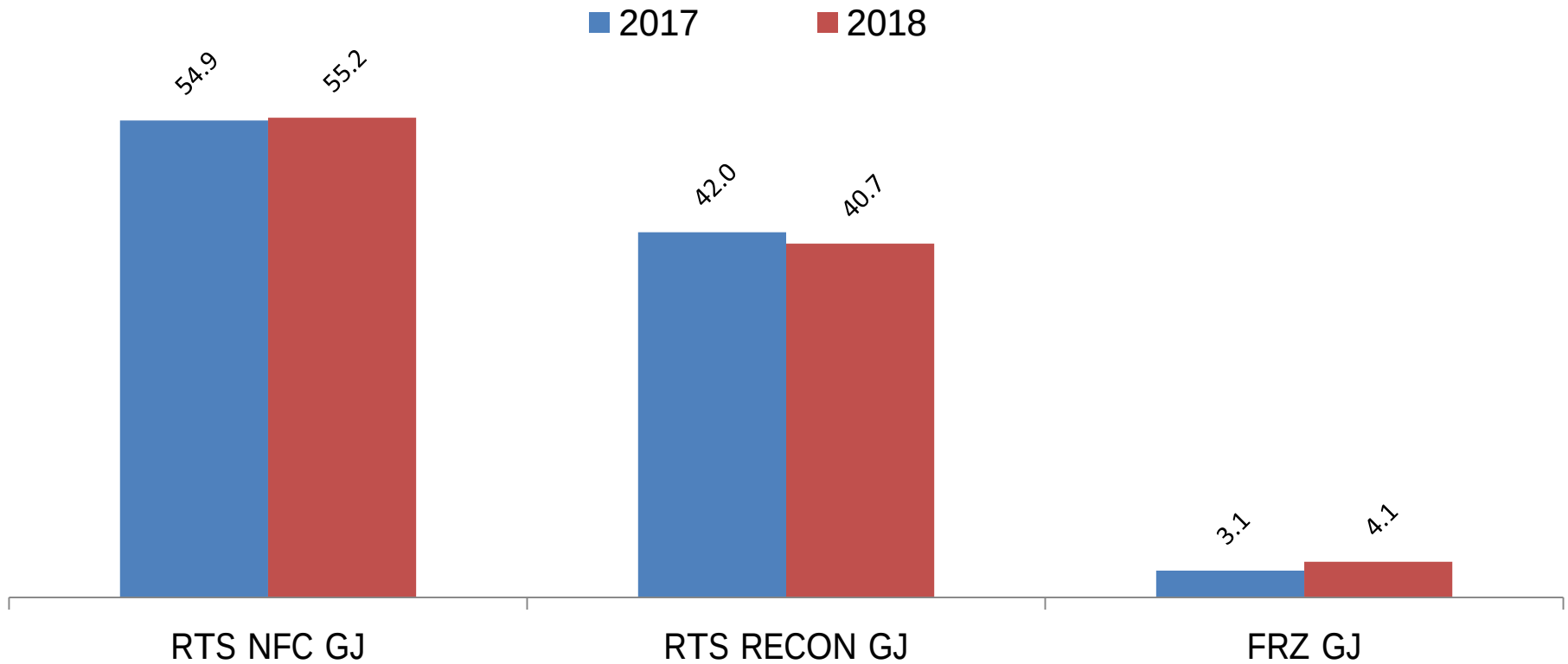
Historic Household Purchasing Trends

Year	Household Penetration	Buying Rate	Purchase Frequency	% Purchased on Perceived Deal
2009	6.6	2.0	3.1	26
2010	6.2	2.0	3.0	25
2011	5.5	2.0	3.2	24
2012	5.5	1.9	2.9	24
2013	5.1	1.9	2.9	25
2014	4.7	1.8	2.9	27
2015	4.2	2.0	3.2	27
2016	4.3	1.9	3.1	28
2017	4.2	1.7	2.8	29
2018	3.9	1.7	2.9	28

Source: Nielsen Homescan Panel Data 2009-2018



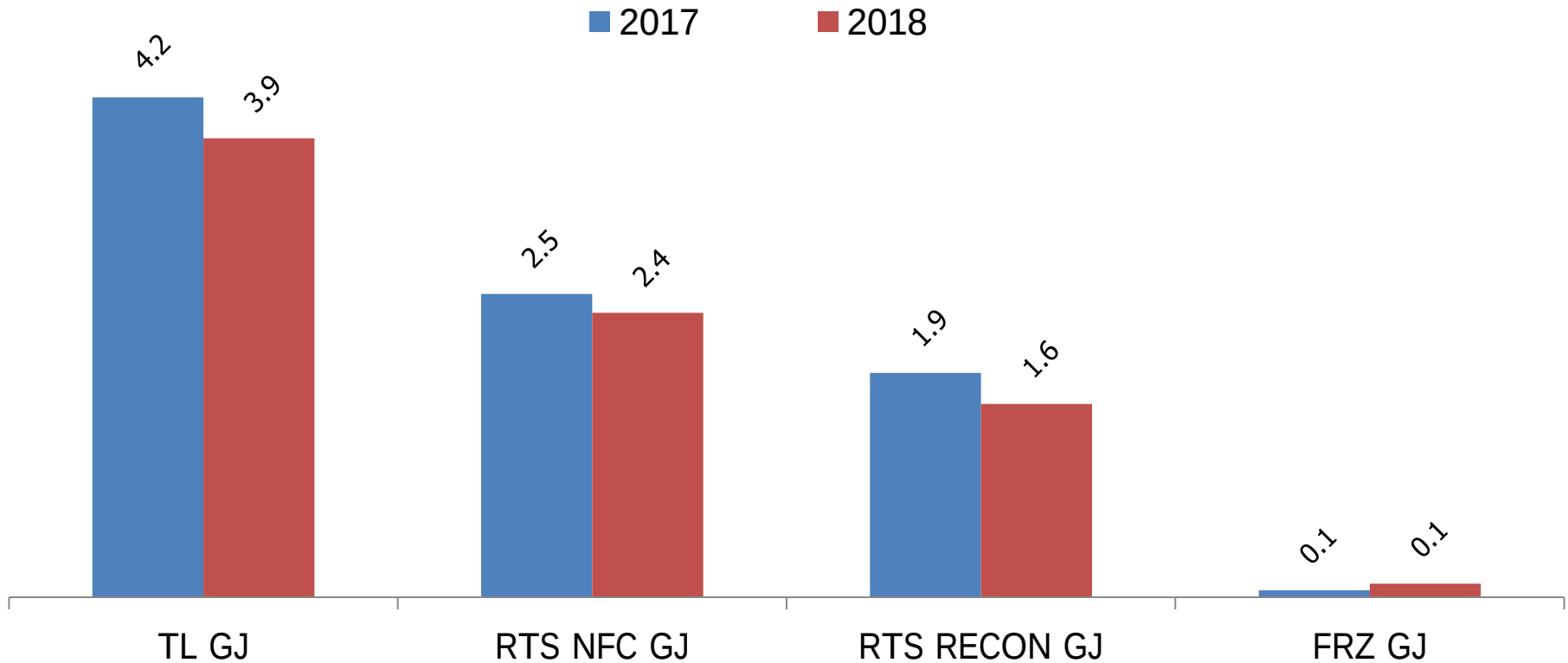
Grapefruit Juice – Share



Source: Nielsen Homescan™ data for Y/E Dec 2018



Grapefruit Juice – Penetration

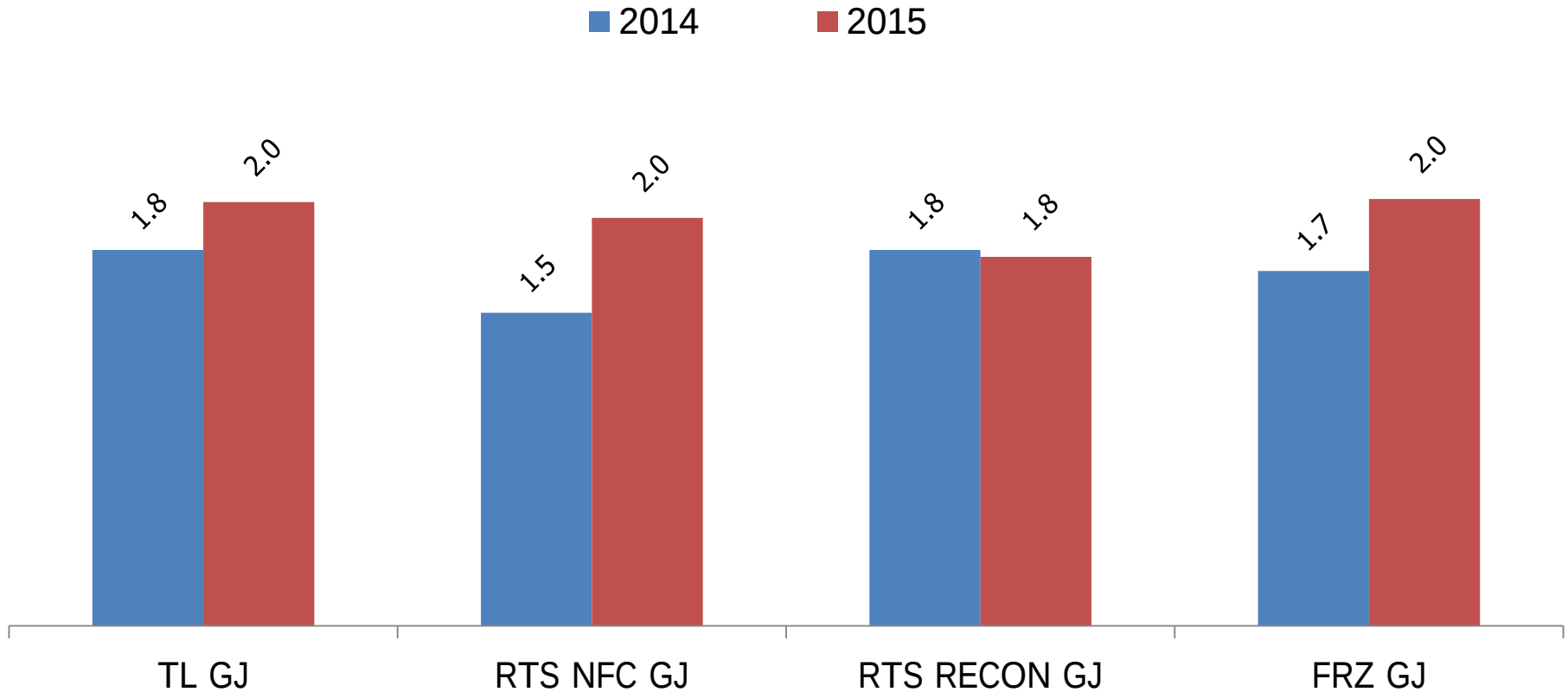


Household Penetration – Percentage of U.S. Households(HHs) buying product at Retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



Grapefruit Juice – Buying Rate

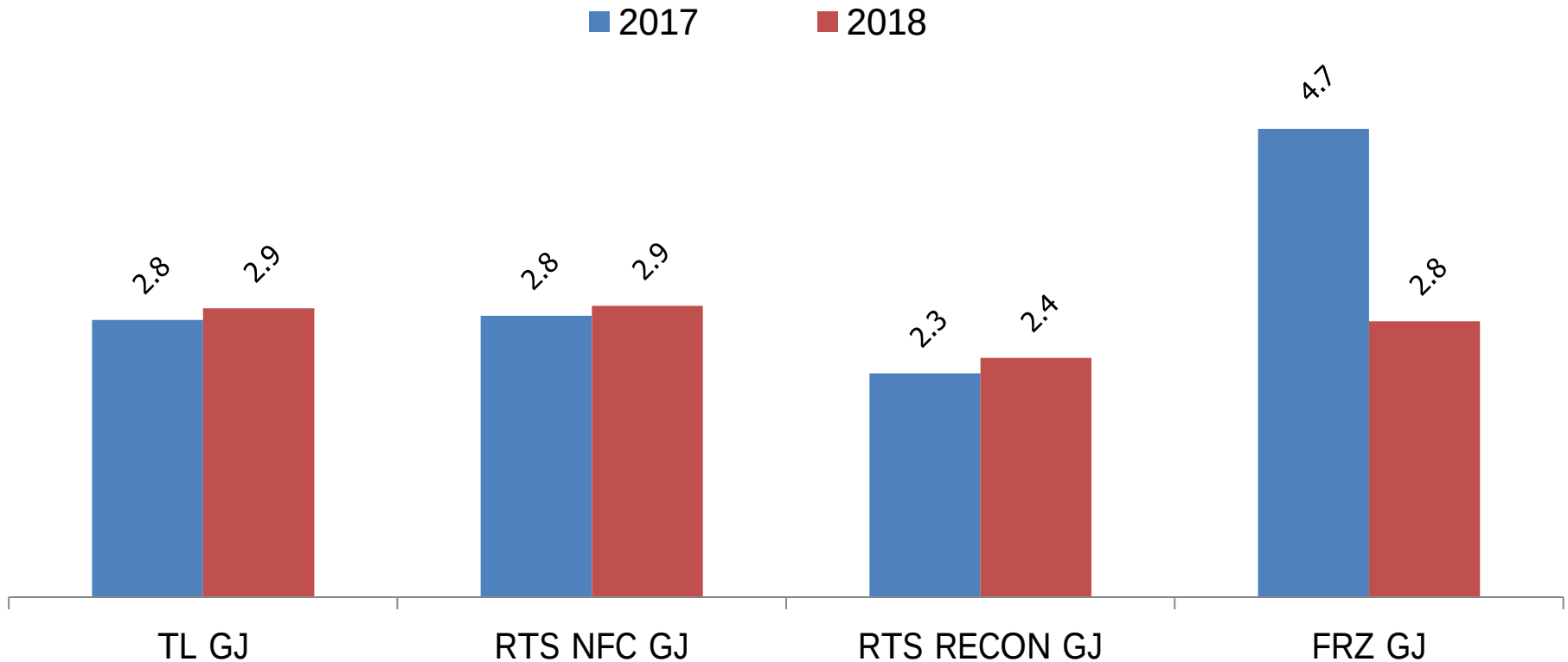


Buying Rate – Average number of gallons purchased annually at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Grapefruit Juice – Purchase Frequency

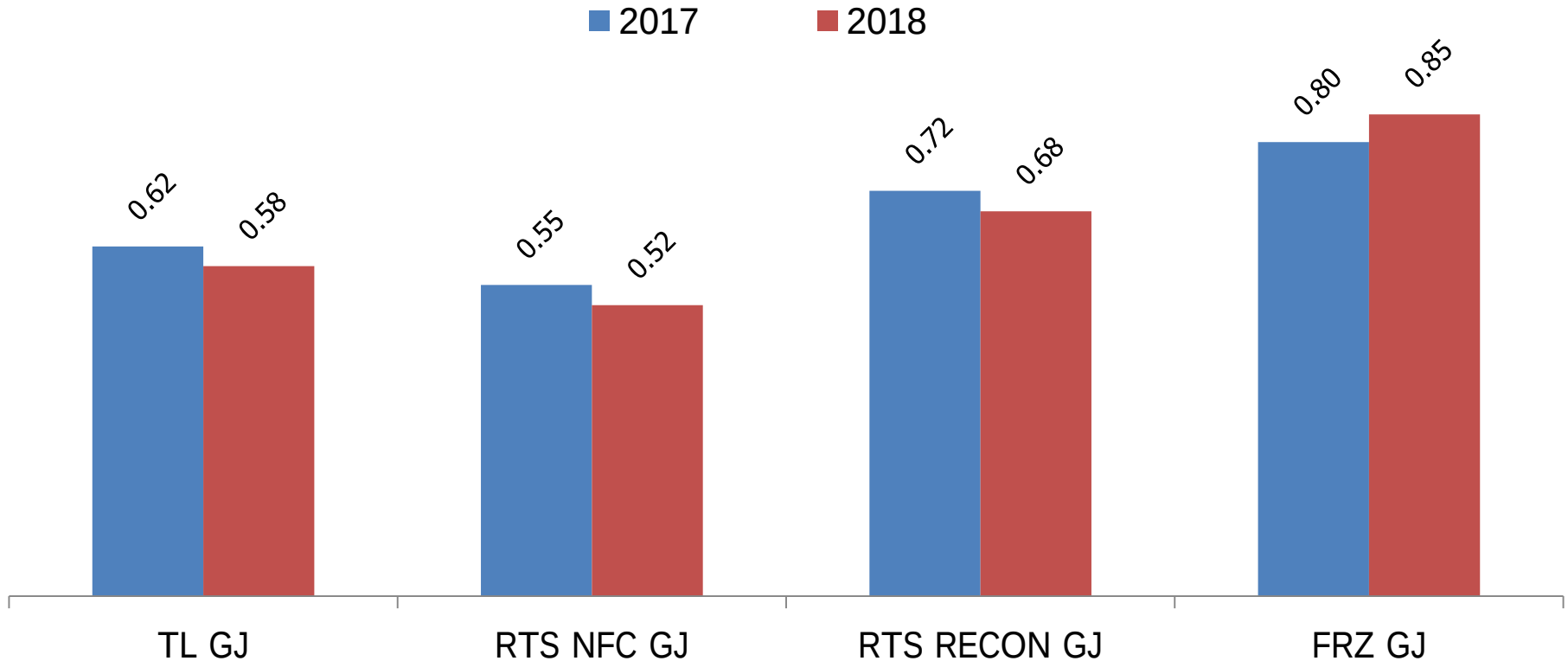


Purchase Frequency – Average number of times per year product was purchased at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Grapefruit Juice – Purchase Size

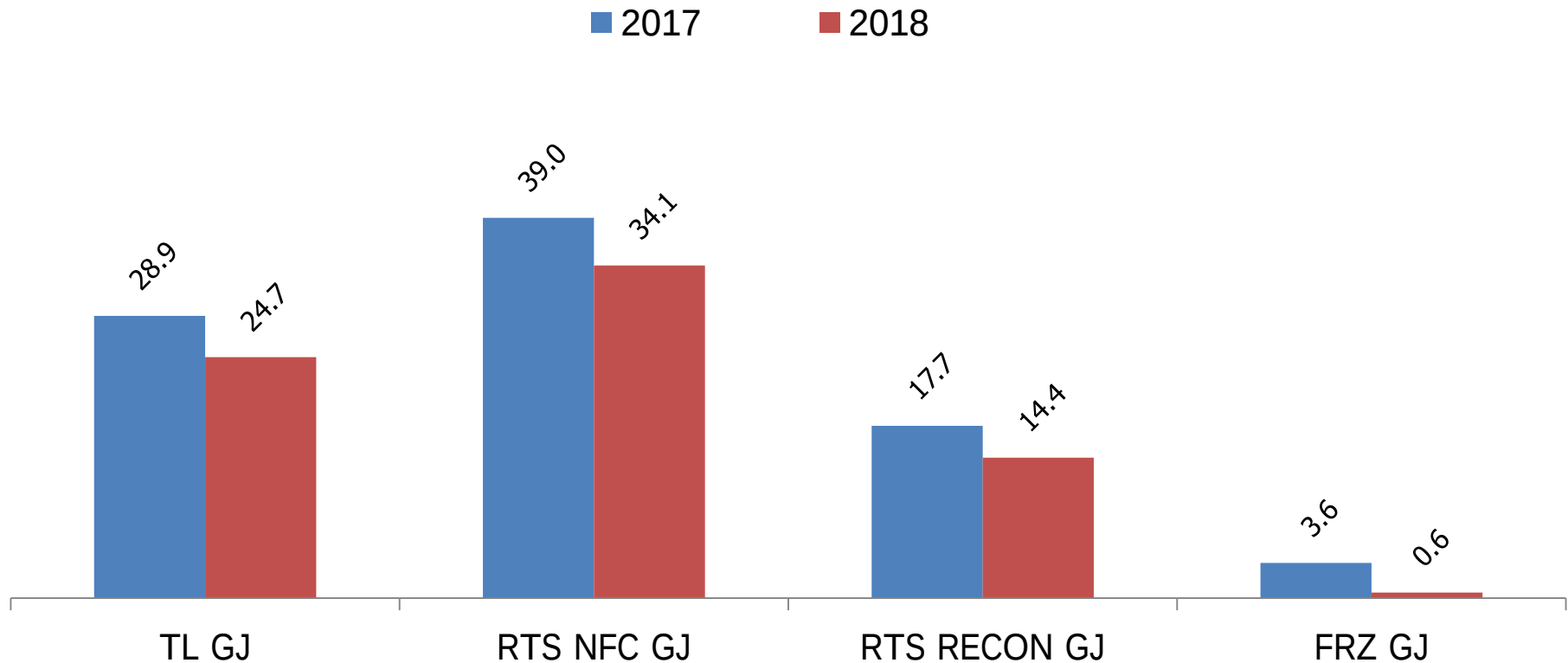


Purchase Size – Average amount (gallons) purchased every time product is purchased at retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



Grapefruit Juice – % Purchased on Any Perceived Deal



% Purchased on Perceived Deal – Percent of product bought at retail when Buyer thought it was on deal (coupon, shelf discount, etc.)

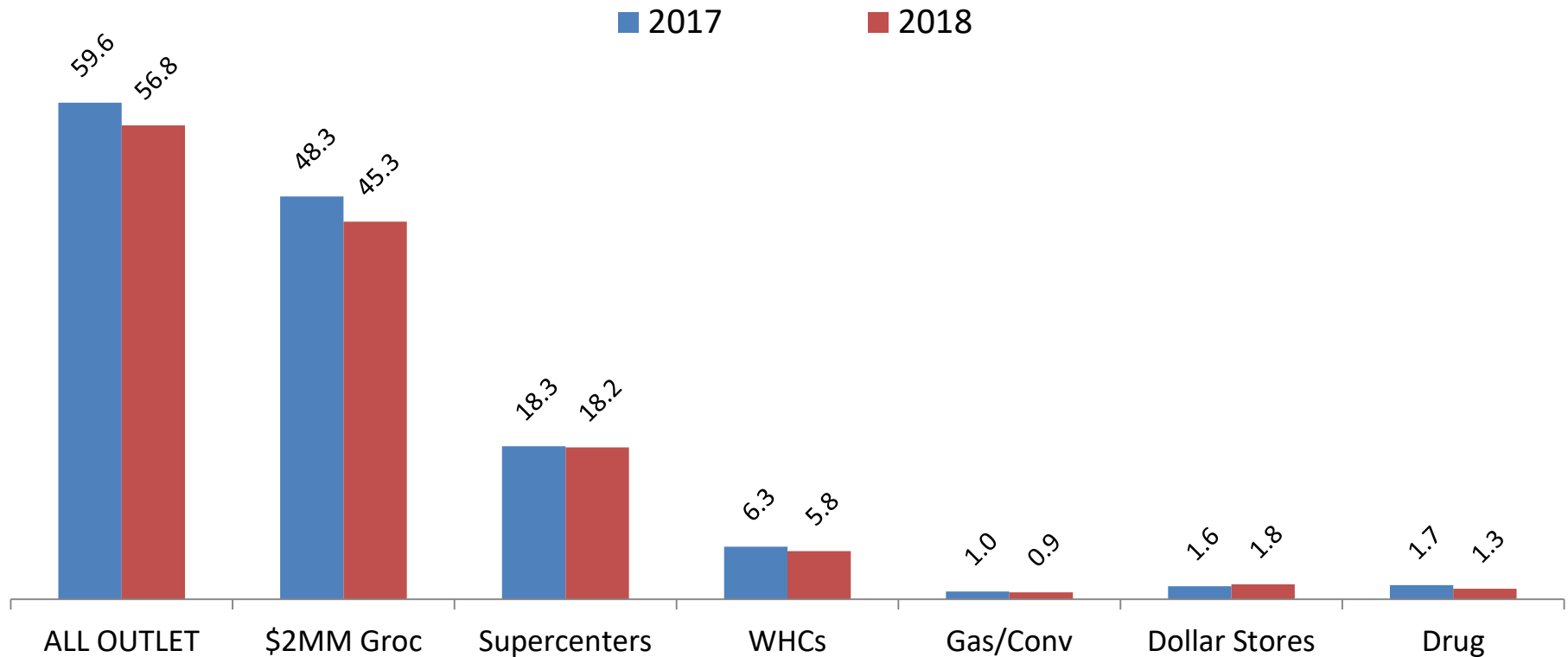
Source: Nielsen Homescan™ data for Y/E Dec 2018



Orange Juice Purchasing by Channel of Trade



Orange Juice – Penetration by Channel

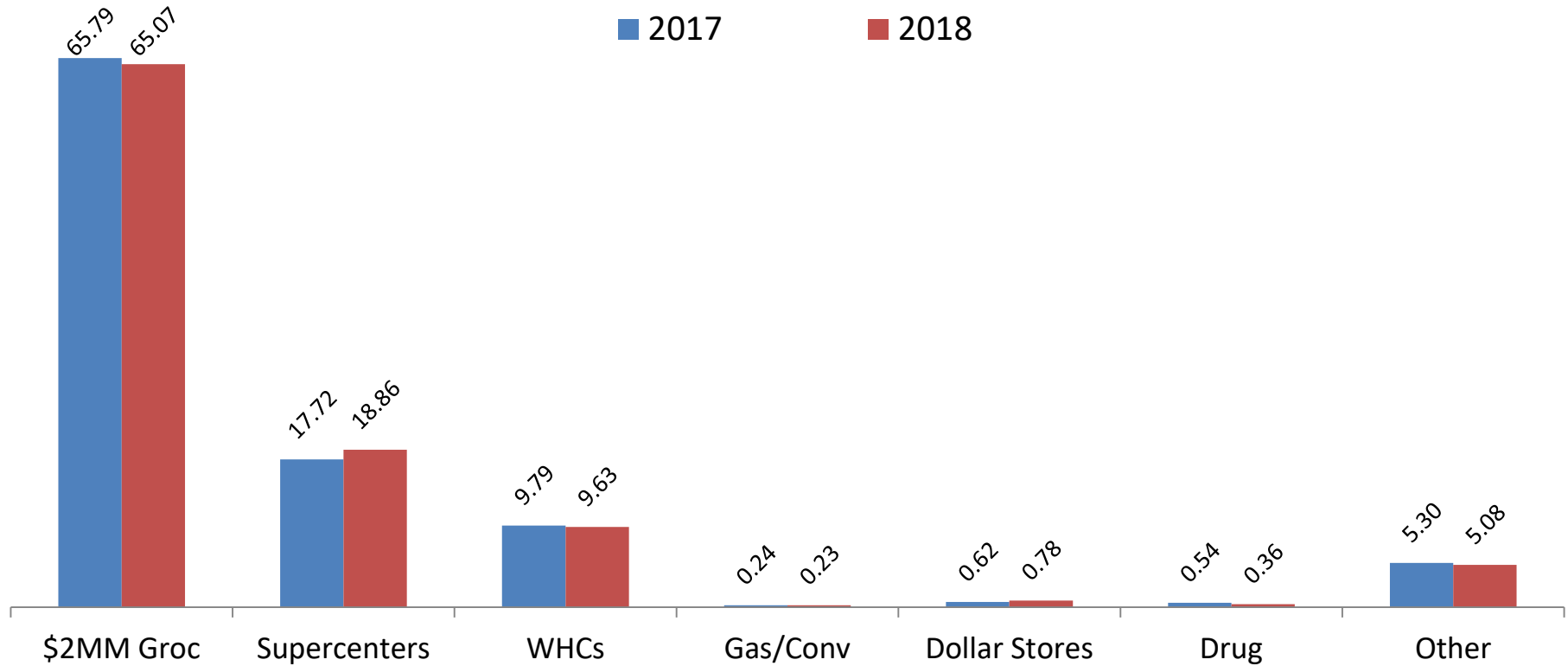


Household Penetration – Percentage of U.S. Households(HHs) buying product at Retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



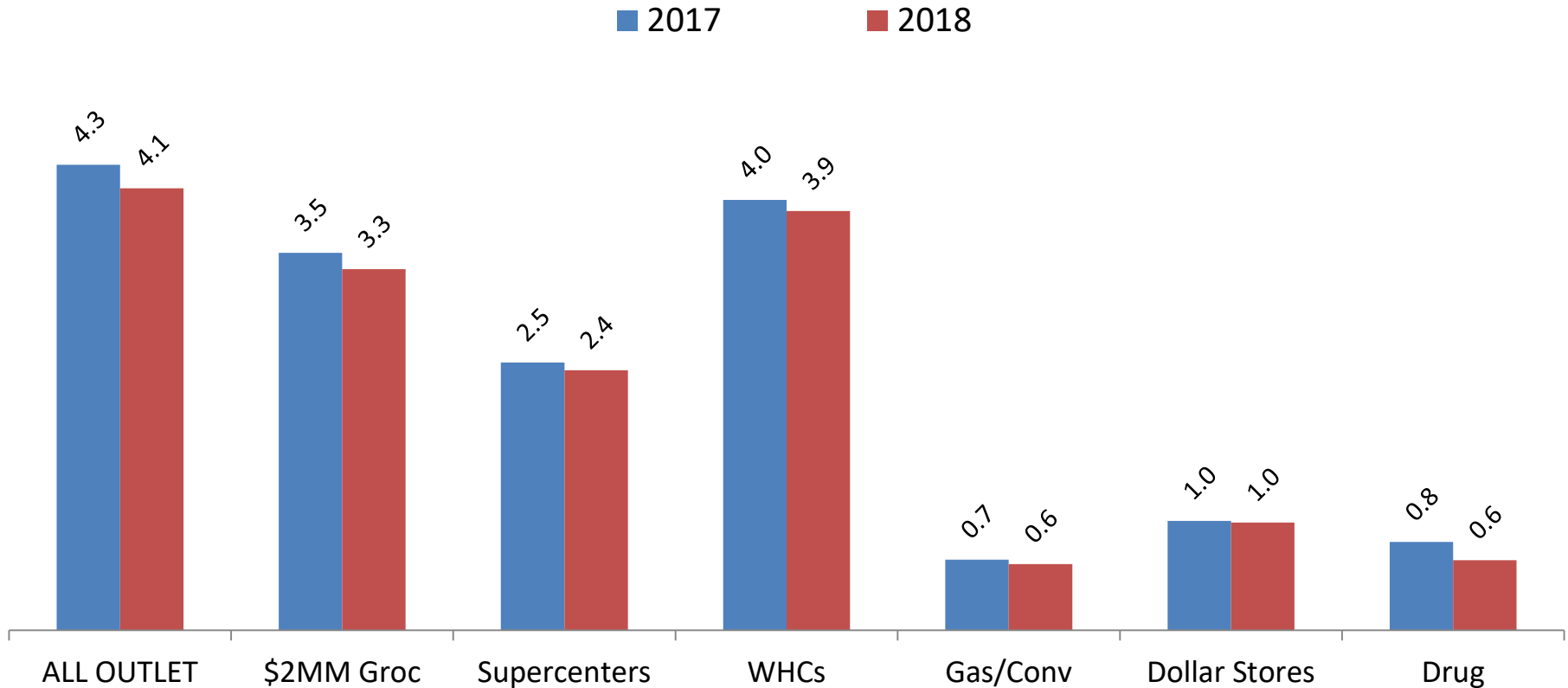
Orange Juice – Volume Share by Channel



Source: Nielsen Homescan™ data for Y/E Dec 2018



Orange Juice – Buying Rate by Channel

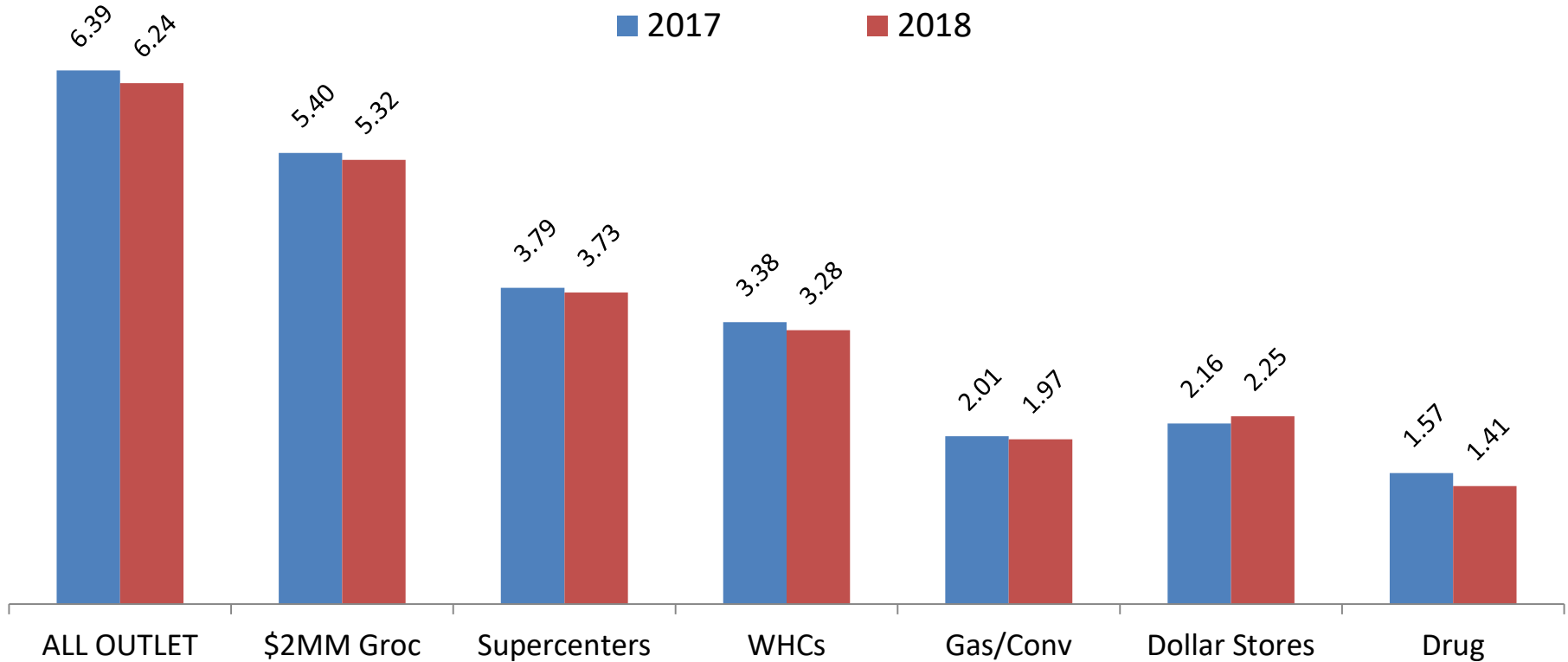


Buying Rate – Average number of gallons purchased annually at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Orange Juice – Purchase Frequency by Channel

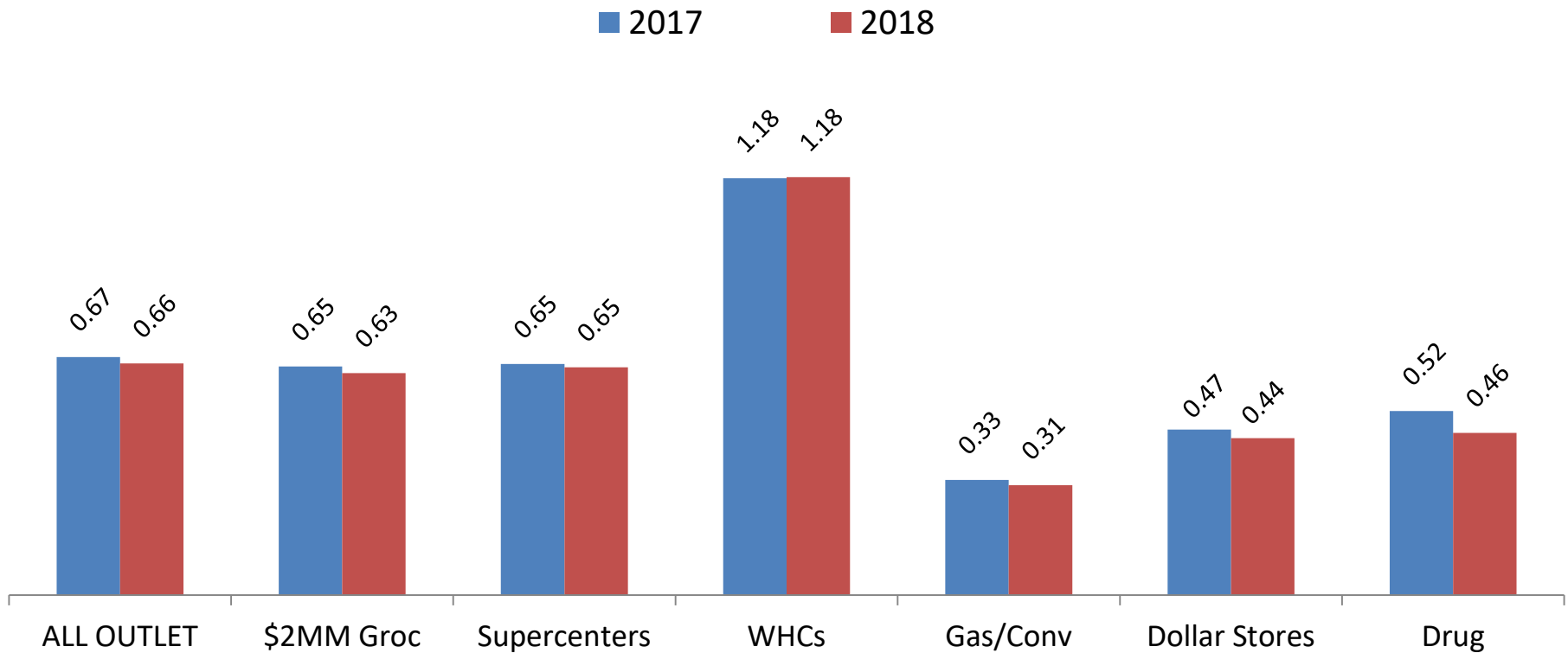


Purchase Frequency – Average number of times per year product was purchased at retail by Buying HHs

Source: Nielsen Homescan™ data for Y/E Dec 2018



Orange Juice – Purchase Size by Channel



Purchase Size – Average amount (gallons) purchased every time product is purchased at retail

Source: Nielsen Homescan™ data for Y/E Dec 2018



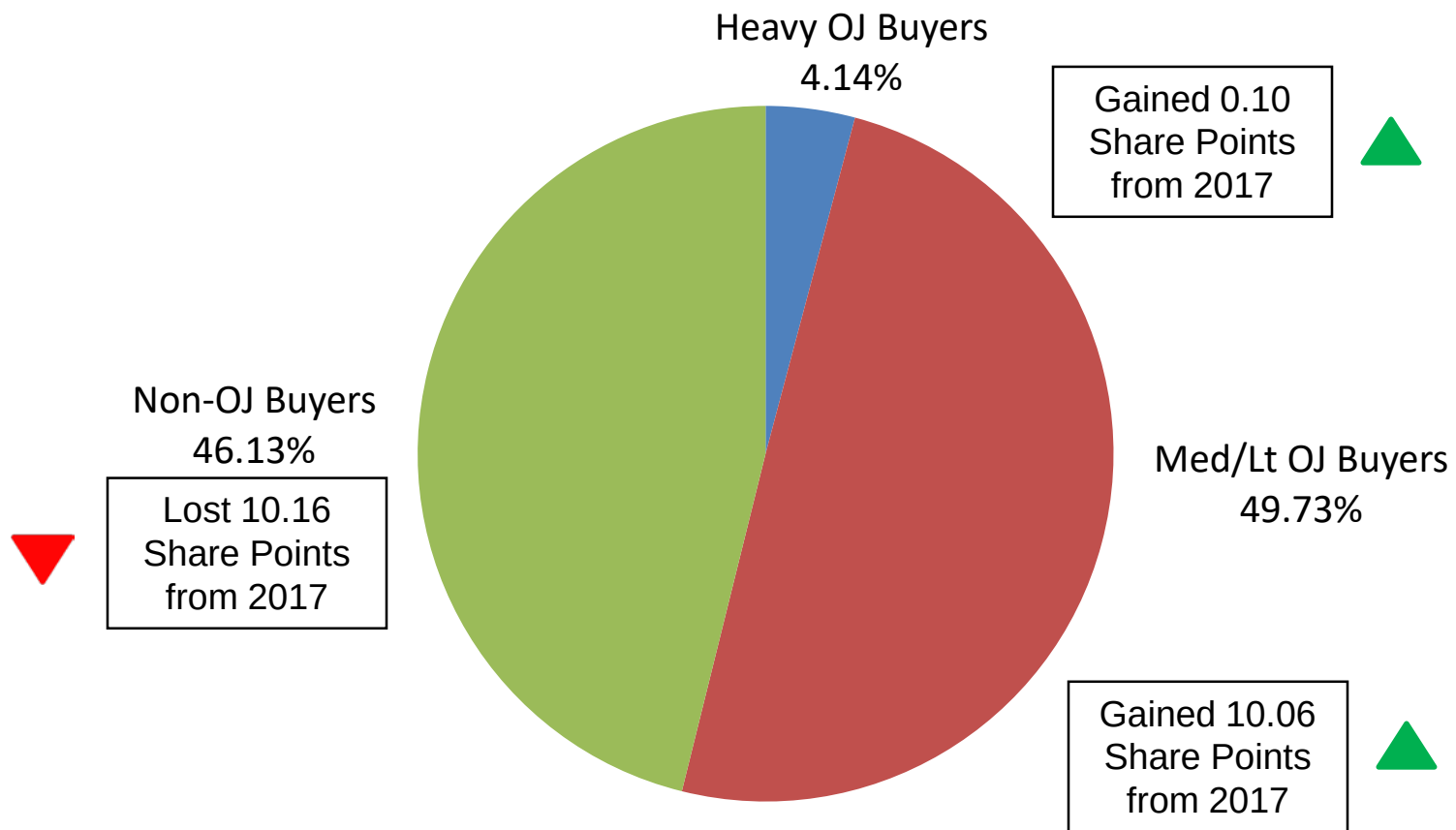
Orange Juice: Heavy, Medium/Light and Non-Buyers



Definitions of OJ Buyers

- For this analysis, three OJ Buyer groups are considered:
 - **HEAVY OJ BUYER** – *Household buys more than 12 gallons of OJ per year*
 - **MED/LT OJ BUYER** – *Household buys 12 gallons or less OJ per year (for further definition of Medium and Light, see Appendix)*
 - **NON-BUYER** – *Household did not report any OJ purchases in 2018 within the retail outlets covered by the Market Summary Report*

OJ and Non-OJ Buying HHs in 2018



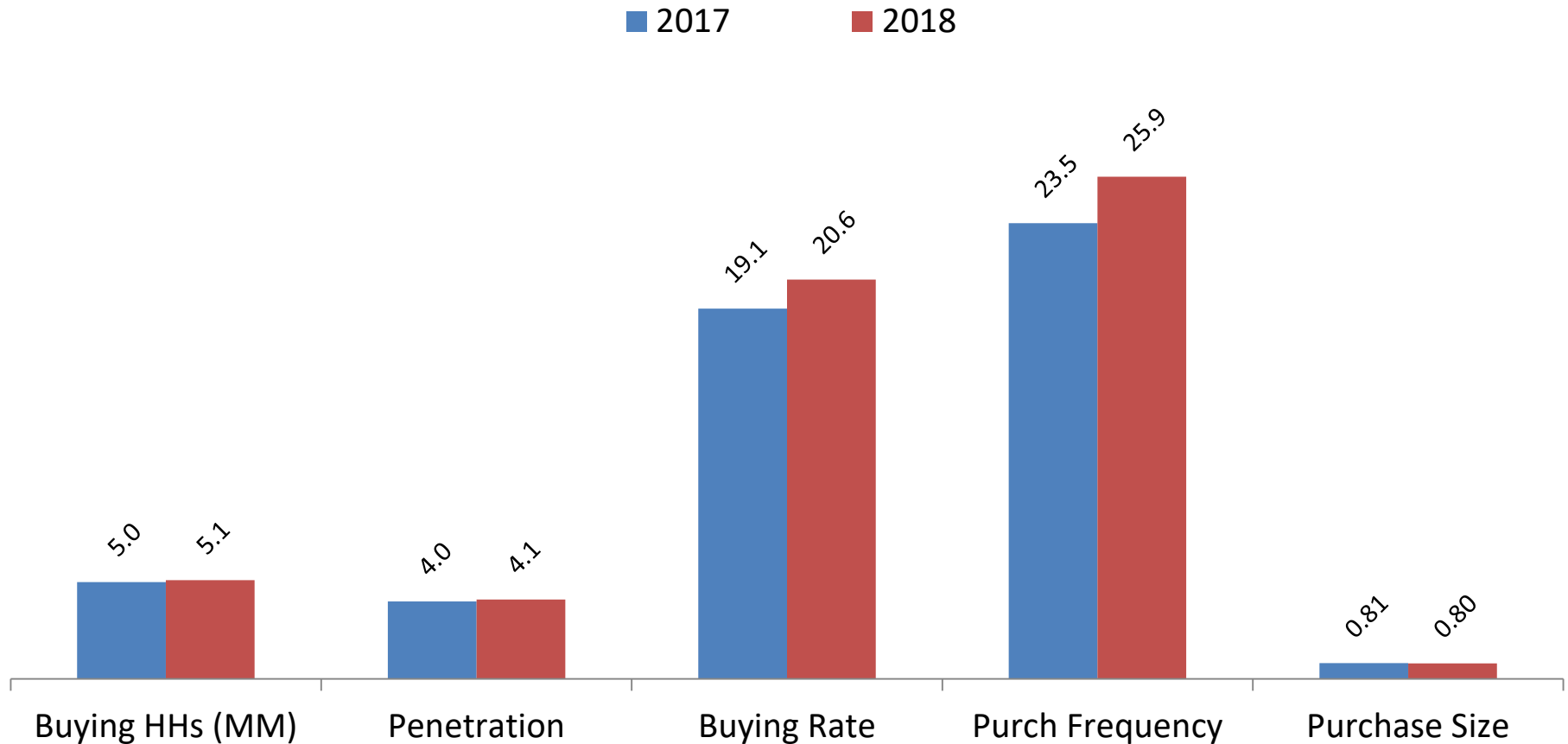
* Heavy, Med/Lt OJ buyers based off of Refrigerated OJ.

* Number of U.S. Households projected to have bought beverages at Retail.

Source: Nielsen Homescan™ data for Y/E Dec 2018



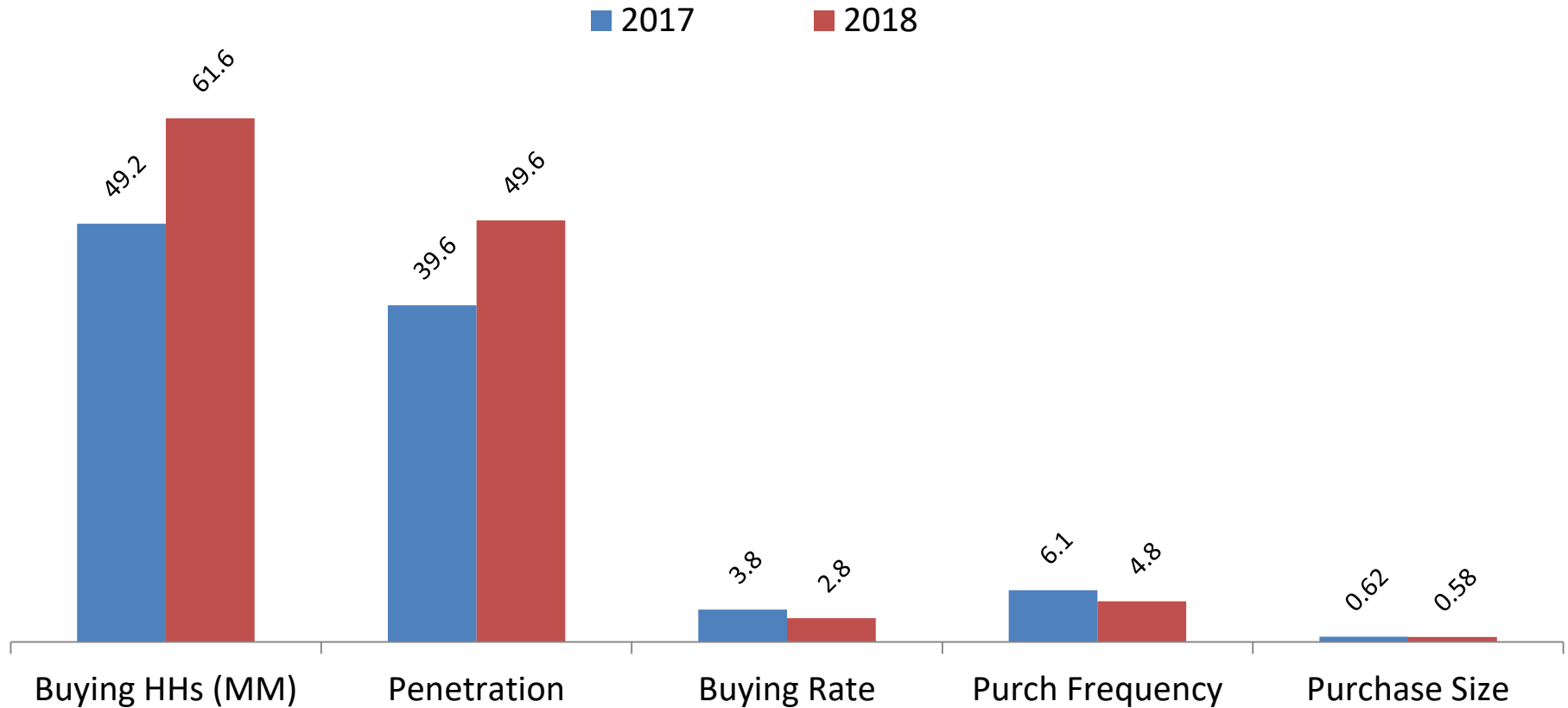
Heavy OJ Buyers – OJ Purchasing Trends



Source: Nielsen Homescan™ data for Y/E Dec 2018



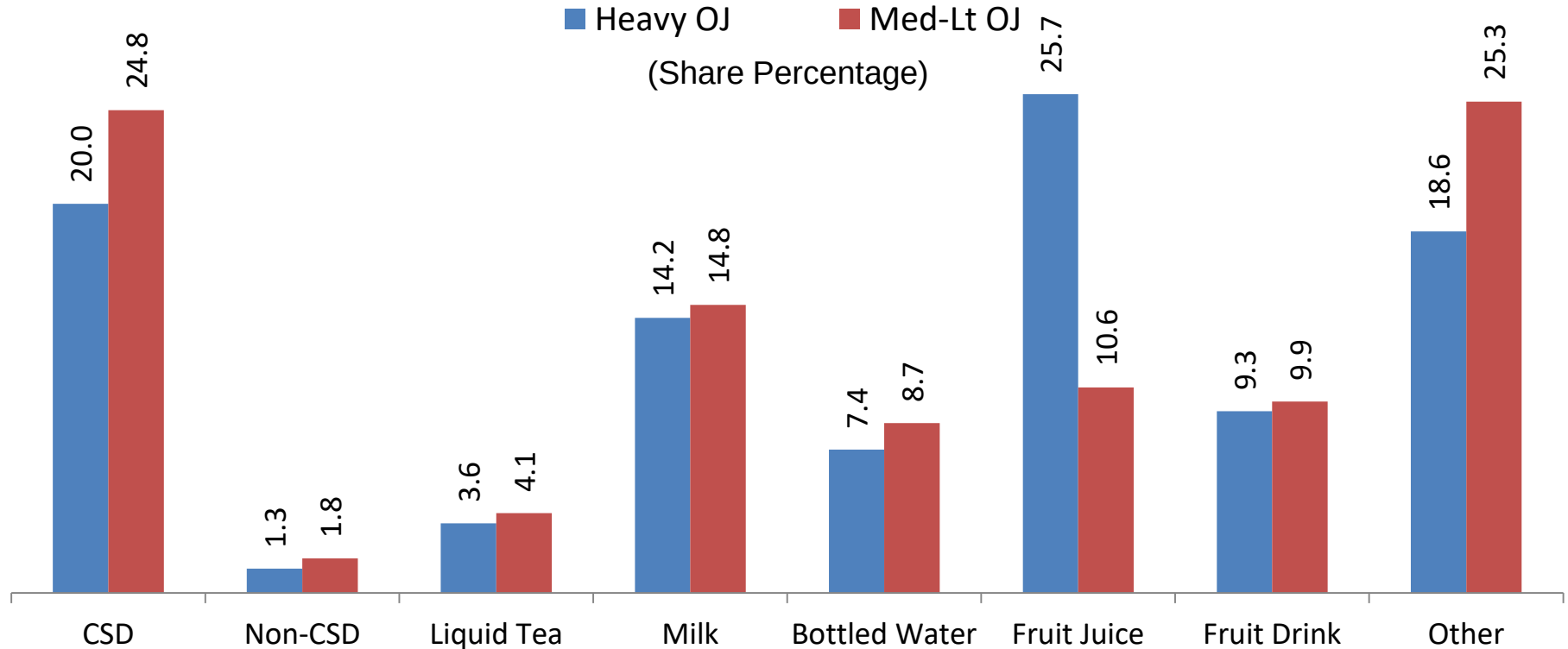
Med/Lt OJ Buyers – OJ Purchasing Trends



Source: Nielsen Homescan™ data for Y/E Dec 2018

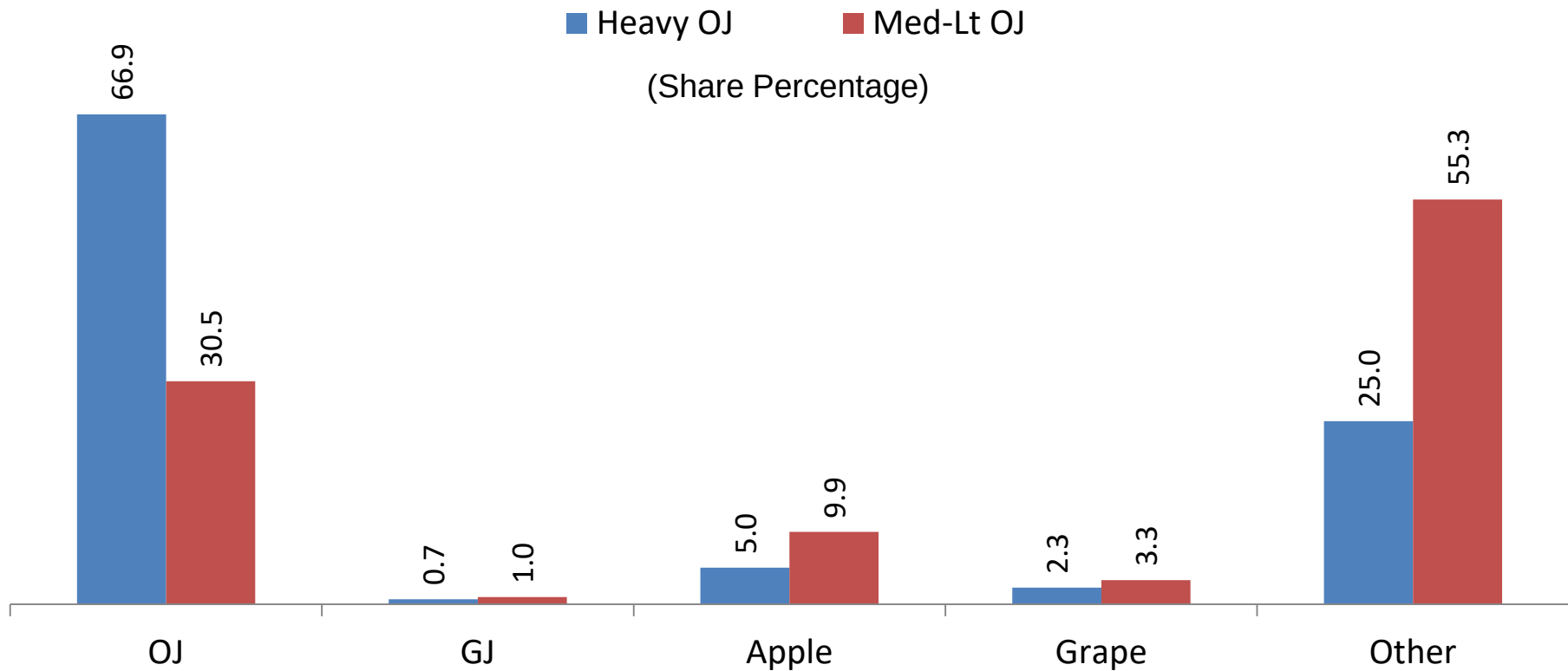


Where did OJ Buying Households spend their beverage dollars in 2018?



Note: Other = Liquid Coffee + Cider + Veg Juice/Drink + Isotonics

Where did OJ Buying Households spend their juice dollars in 2018?



Source: Nielsen Homescan™ data for Y/E Dec 2018

