

Household Purchase Dynamics in the Beverage Category

Nielsen Homescan Household Purchase Analysis

Florida Department of Citrus

March 2021



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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:**
 - 50,258 households recording purchases brought home
 - Demographically & geographically balanced to represent U.S. population
- **The Data:**
 - All UPC coded purchases from all outlets (over 8,000 unique UPCs)
 - Consumer perceived details (i.e. coupons & store sales)
- **Time Periods:**
 - Year ending 12/26/2020 vs. Year-Ago
- **Volume:**
 - Equivalent gallons

Parameters

- **Geography:**
 - Total U.S., All Outlets
- **Category Definition:**
 - TLL Beverages* is disaggregated into the following segments:
 - Carbonated Soft Drinks (CSD)
 - Ref, White & Flavored Milk
 - Liquid Tea
 - Bottled Water
 - Isotonics
 - Dry Coffee
 - Shakes & meal replacement drinks
 - Plant-based milk alternatives (e.g., oat, almond)
 - Kombucha (disaggregated from TLL Beverage to monitor consumer trends)
 - Non-Carb Soft Drinks (non CSD)
 - Liquid Coffee
 - Dry Tea
 - Fruit Juices & Drinks
 - Vegetable Juice/Drinks

*Light Beer is still included in TLL Beverages total due to Nielsen methodology; not reported as a segment.

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
- Lite 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)

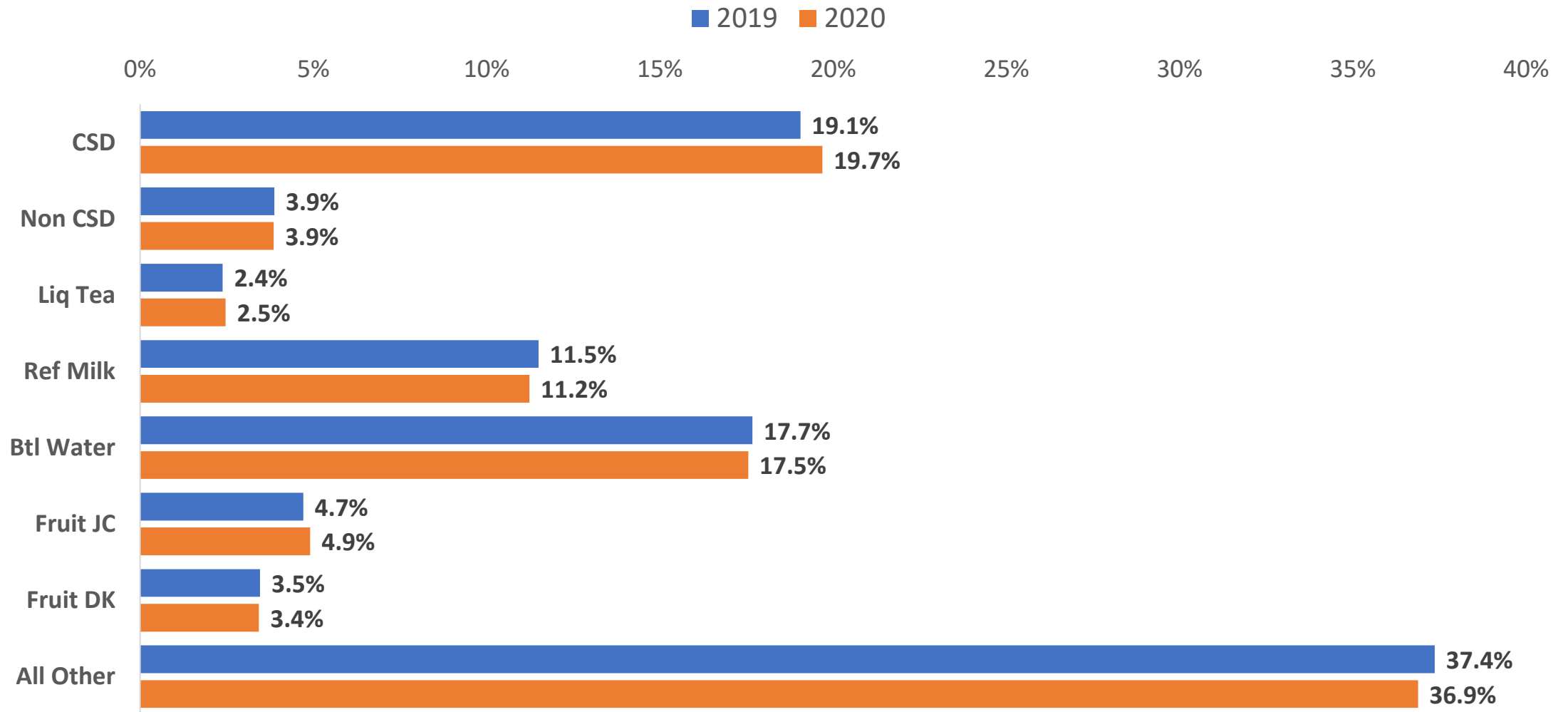
Parameters

- **Reported Here:**
 - Market Summary Findings for 2020
 - *Products*
 - *Channels (types of retail stores)*
 - *Measures*
 - *Buyer groups*
 - Two-Year Trends (2019 vs. 2020)



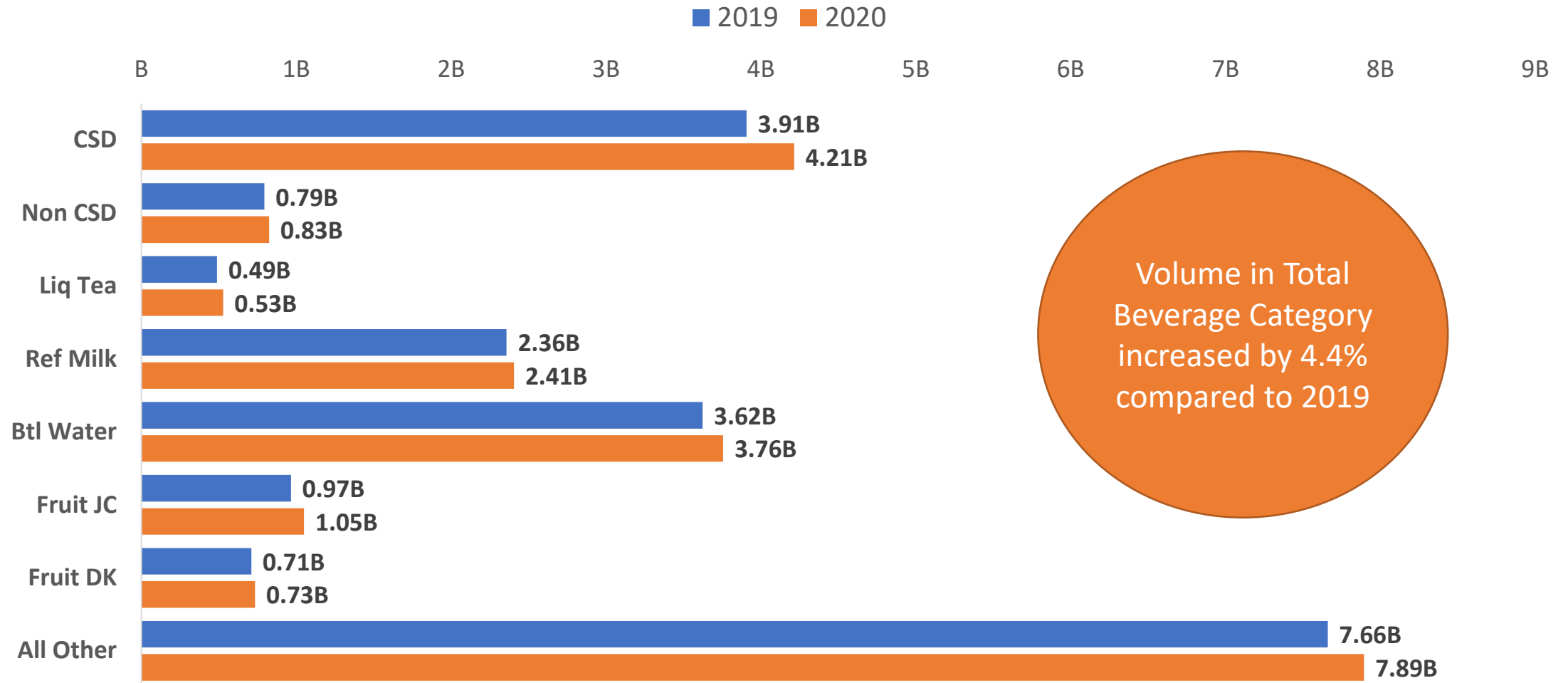
Volume & Share Trends in Beverage Categories

Beverage Category Gallon Shares



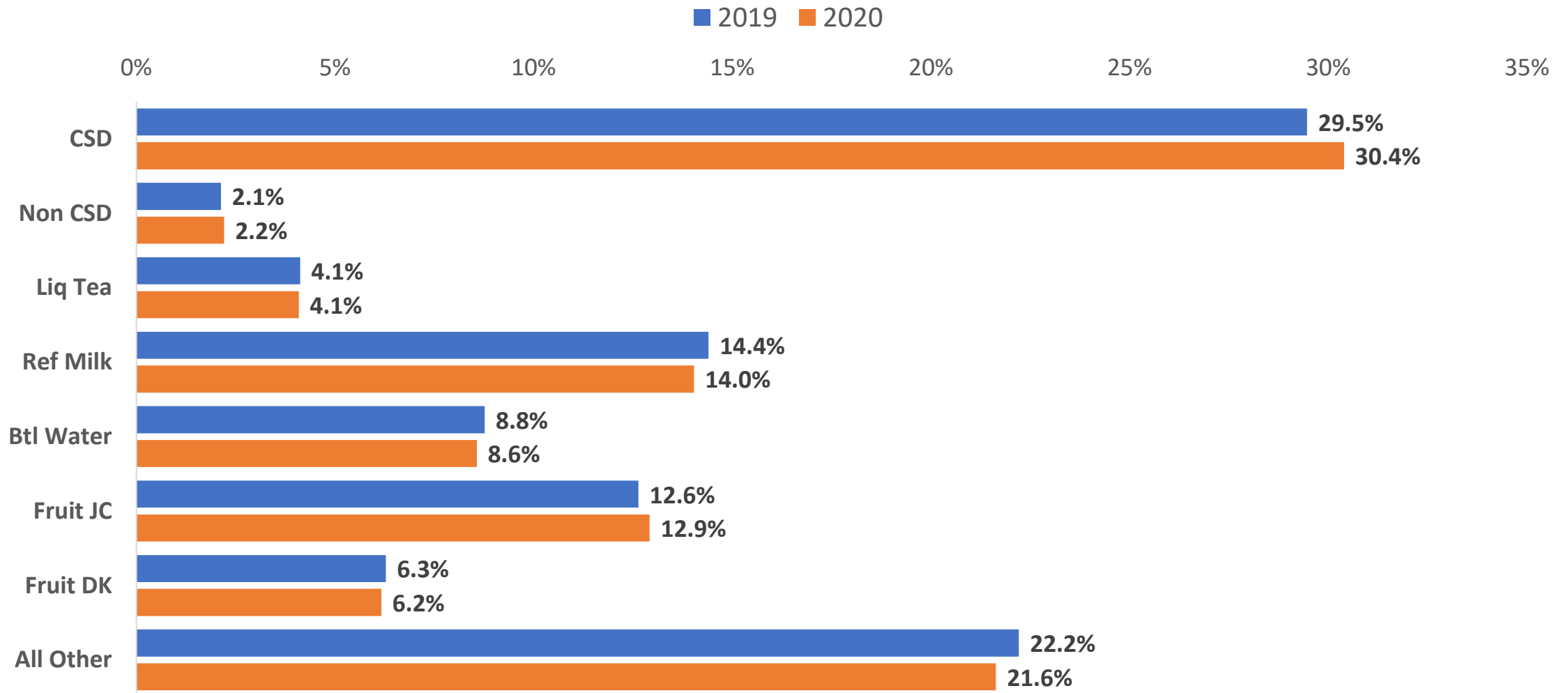
Source: Nielsen Homescan™ data for Y/E Dec 2020

Beverage Categories (in billions of gallons)



Source: Nielsen Homescan™ data for Y/E Dec 2020

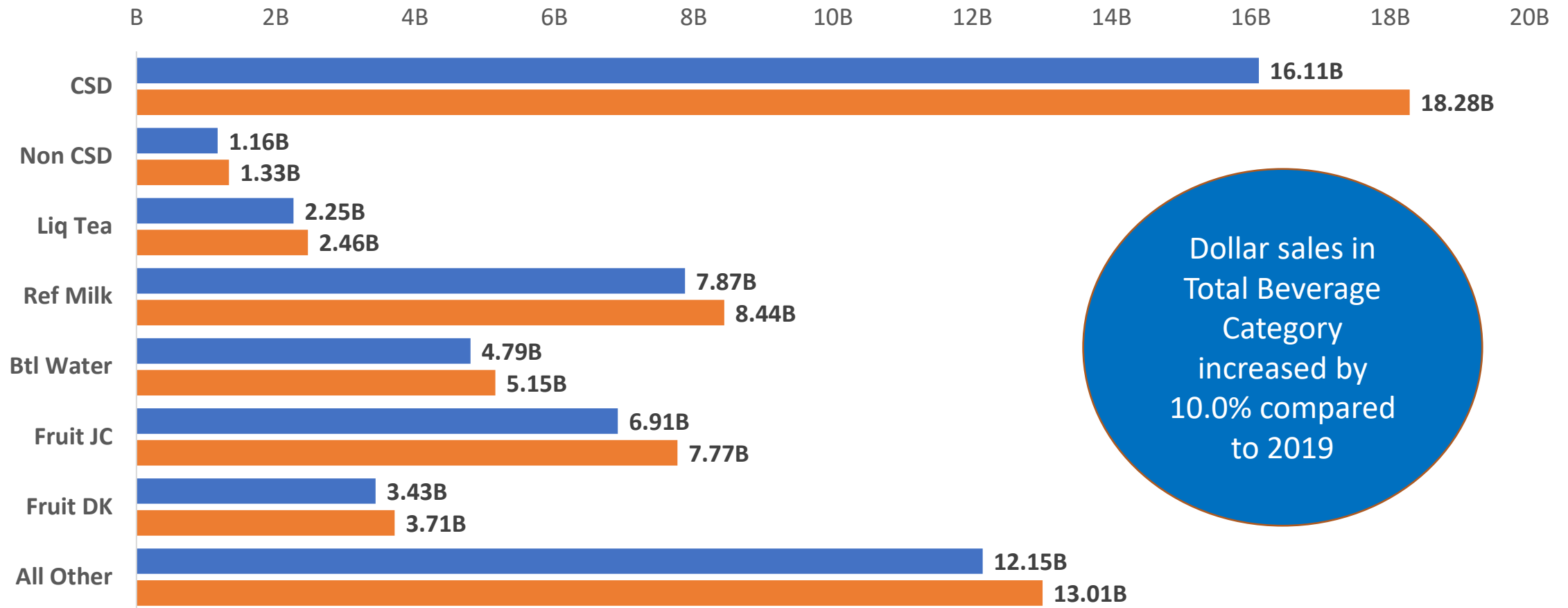
Beverage Category Dollar Shares



Source: Nielsen Homescan™ data for Y/E Dec 2020

Beverage Categories (in billions of dollars)

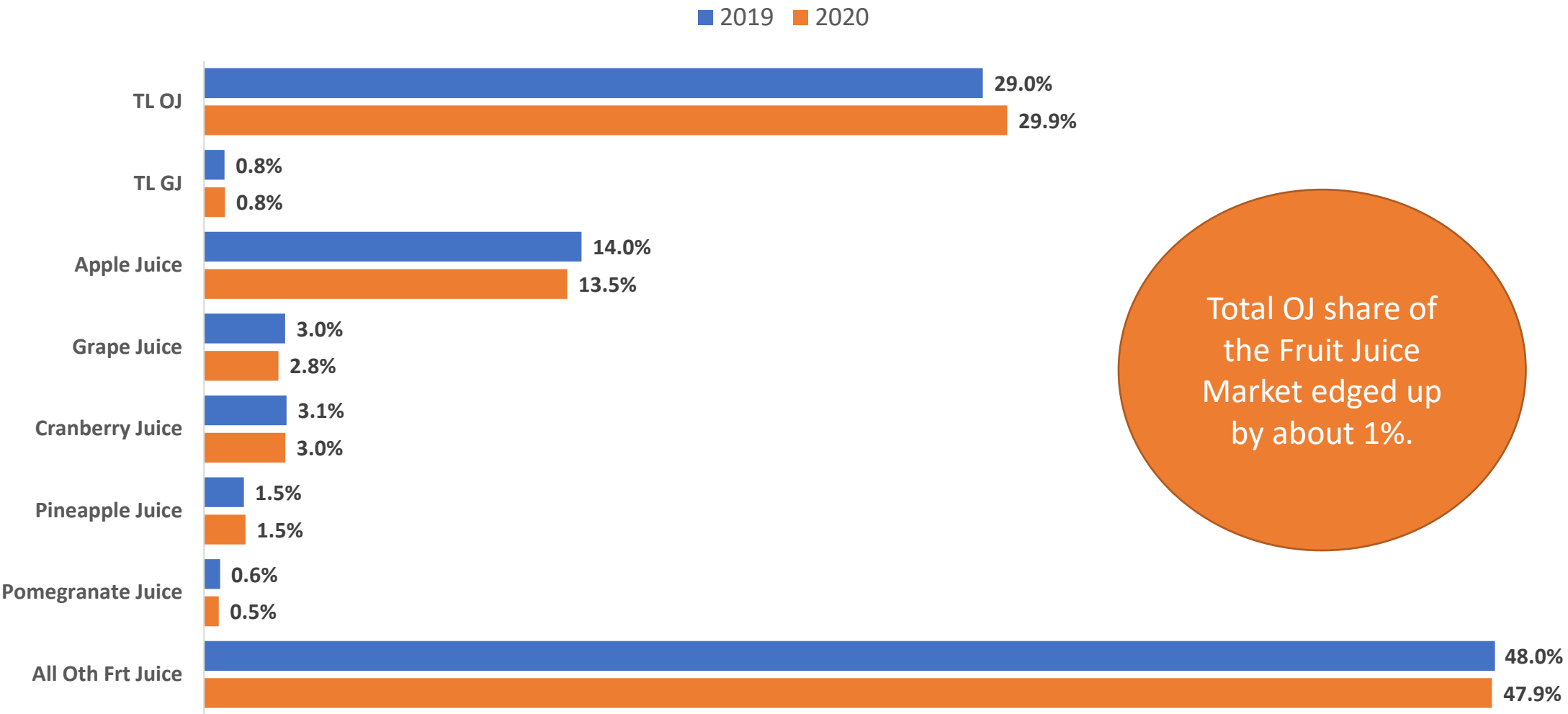
■ 2019 ■ 2020



Dollar sales in
Total Beverage
Category
increased by
10.0% compared
to 2019

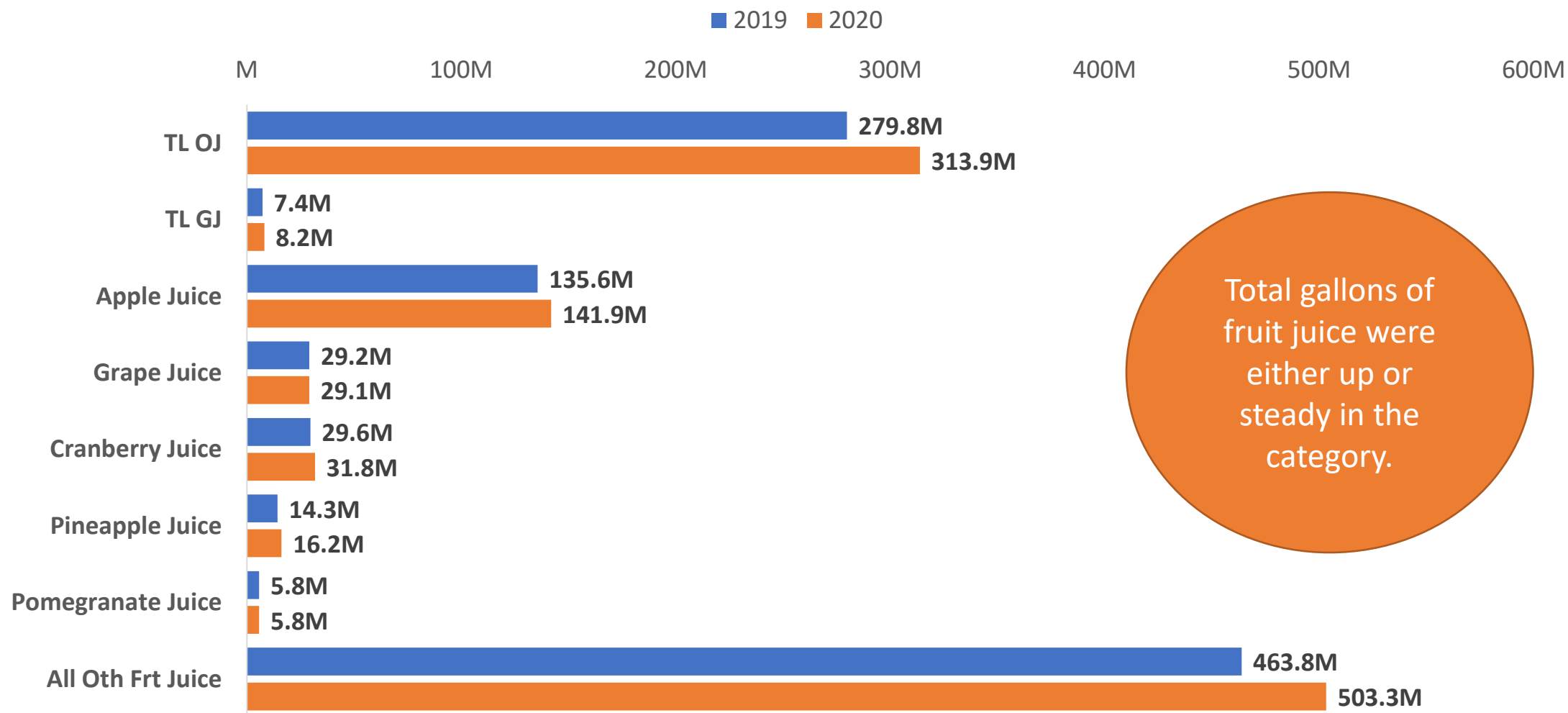
Source: Nielsen Homescan™ data for Y/E Dec 2020

Fruit Juice (gallon shares)



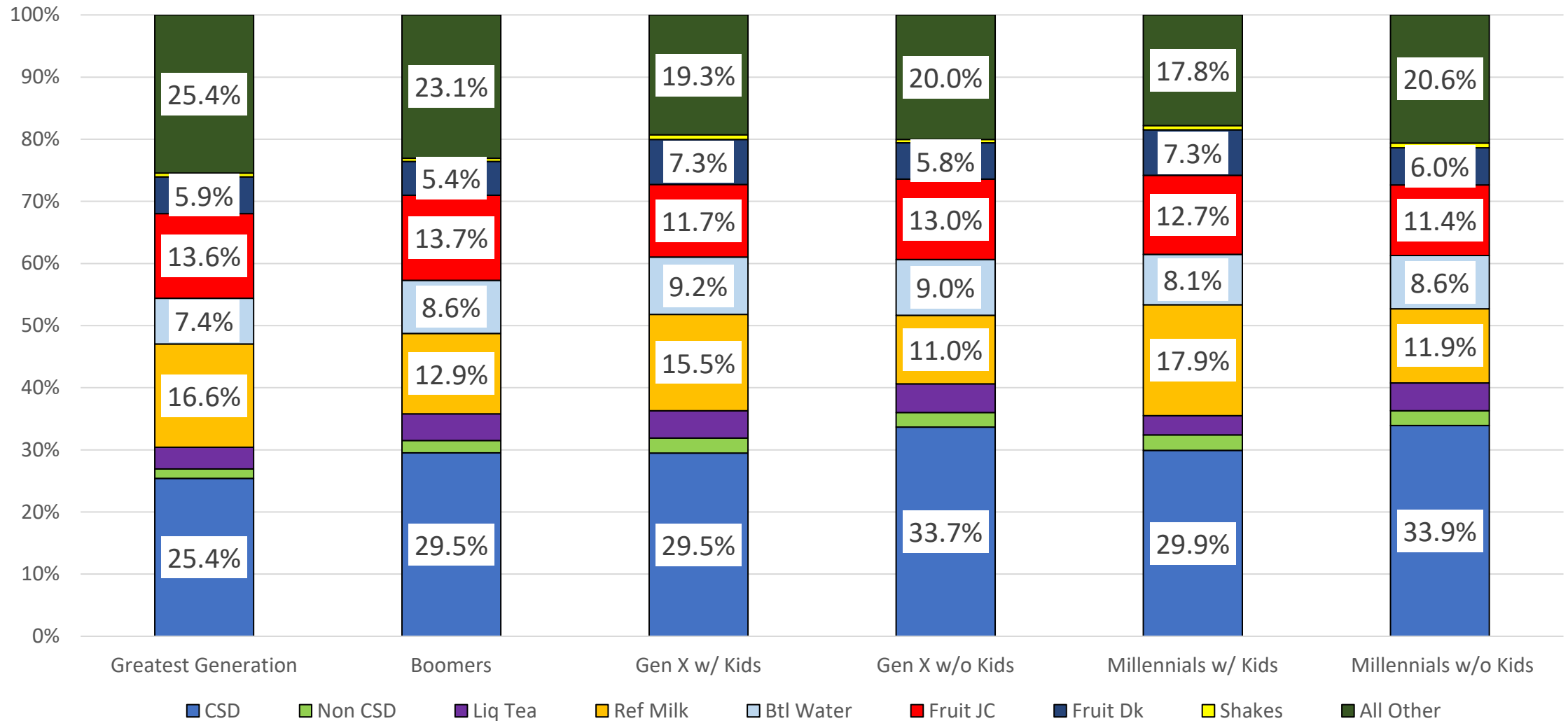
Source: Nielsen Homescan™ data for Y/E Dec 2020

Fruit Juice (in millions of gallons)



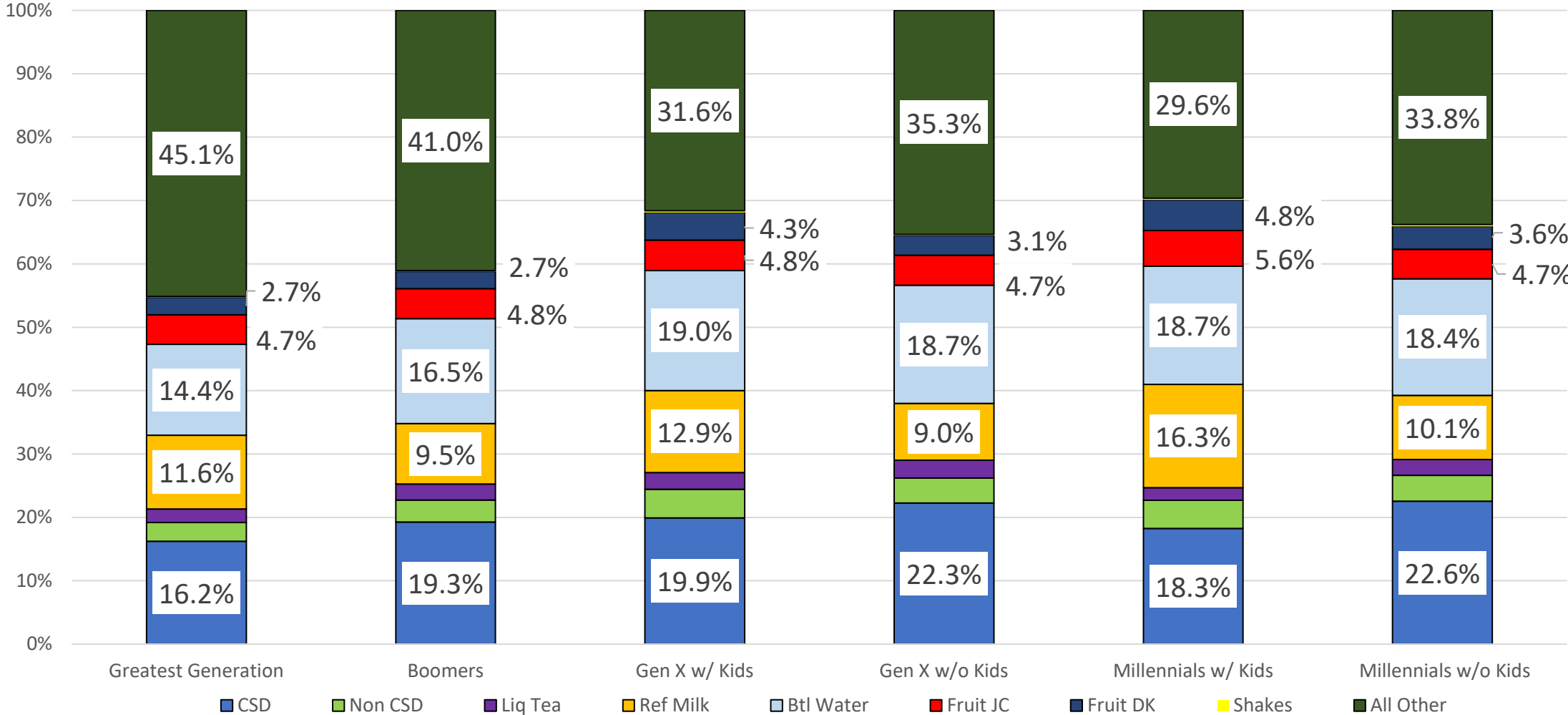
Source: Nielsen Homescan™ data for Y/E Dec 2020

Beverage Category Dollar Shares (2020)



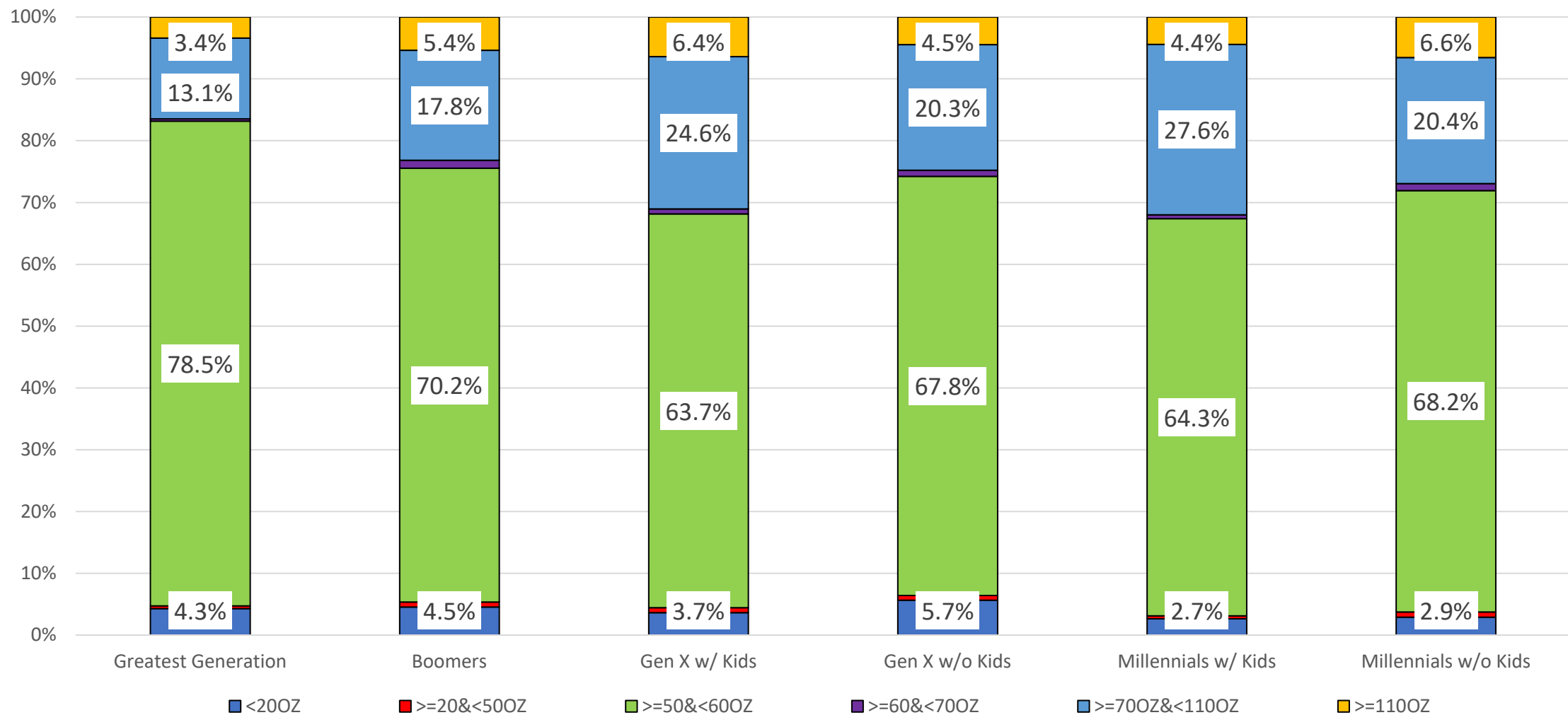
Source: Nielsen Homescan™ data for Y/E Dec 2020

Beverage Category Volume Shares in (2020)



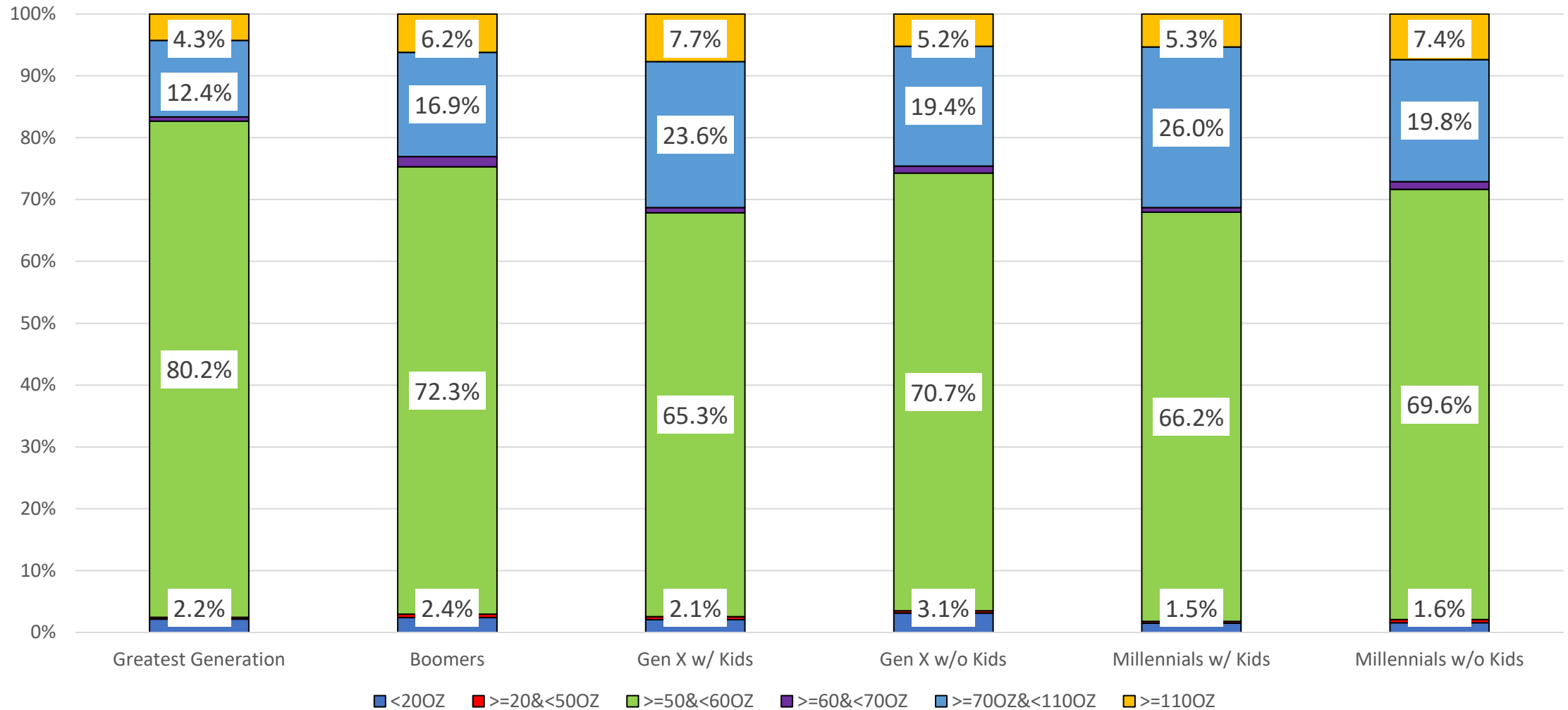
Source: Nielsen Homescan™ data for Y/E Dec 2020

OJ NFC Dollar Shares (2020)



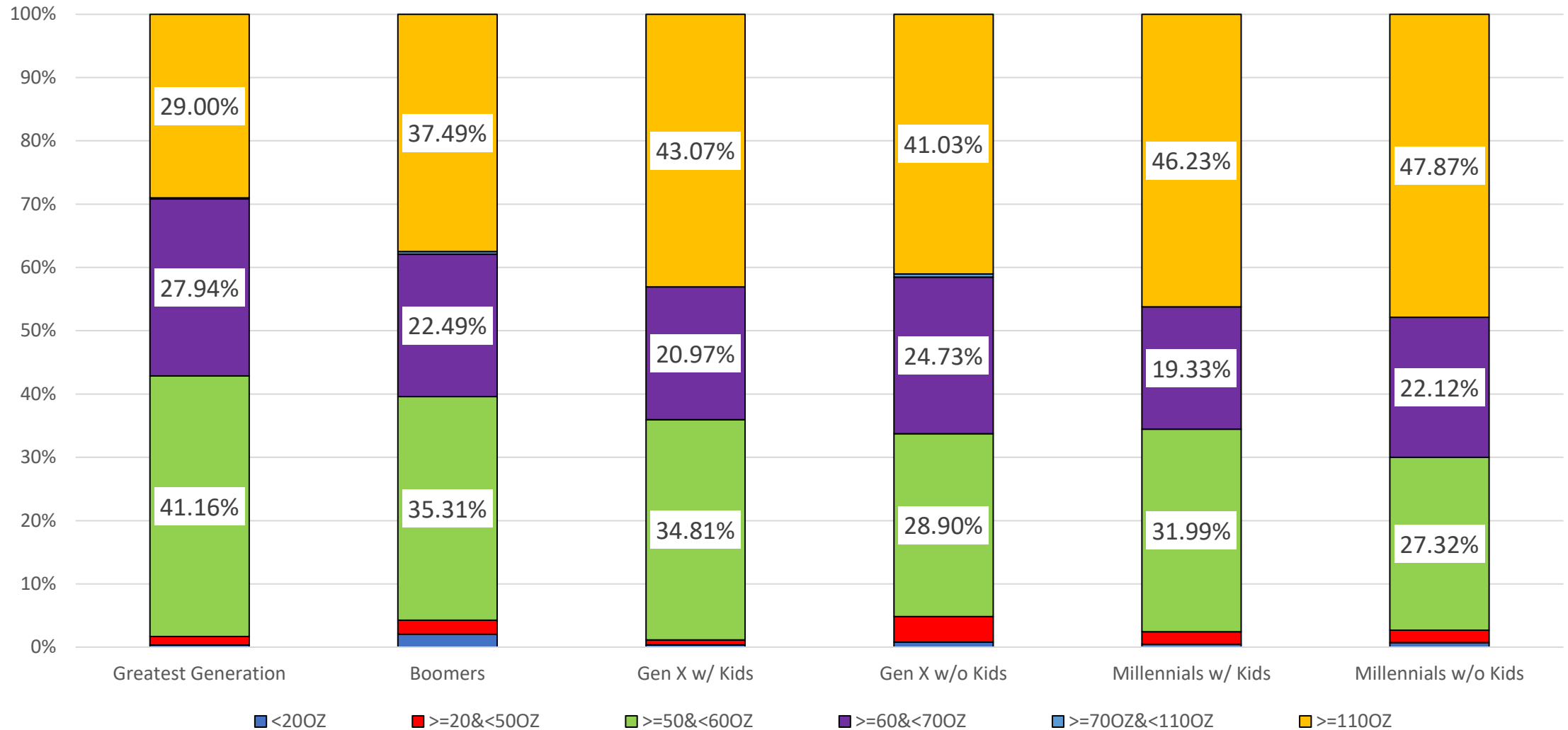
Source: Nielsen Homescan™ data for Y/E Dec 2020

OJ NFC Volume Shares (2020)



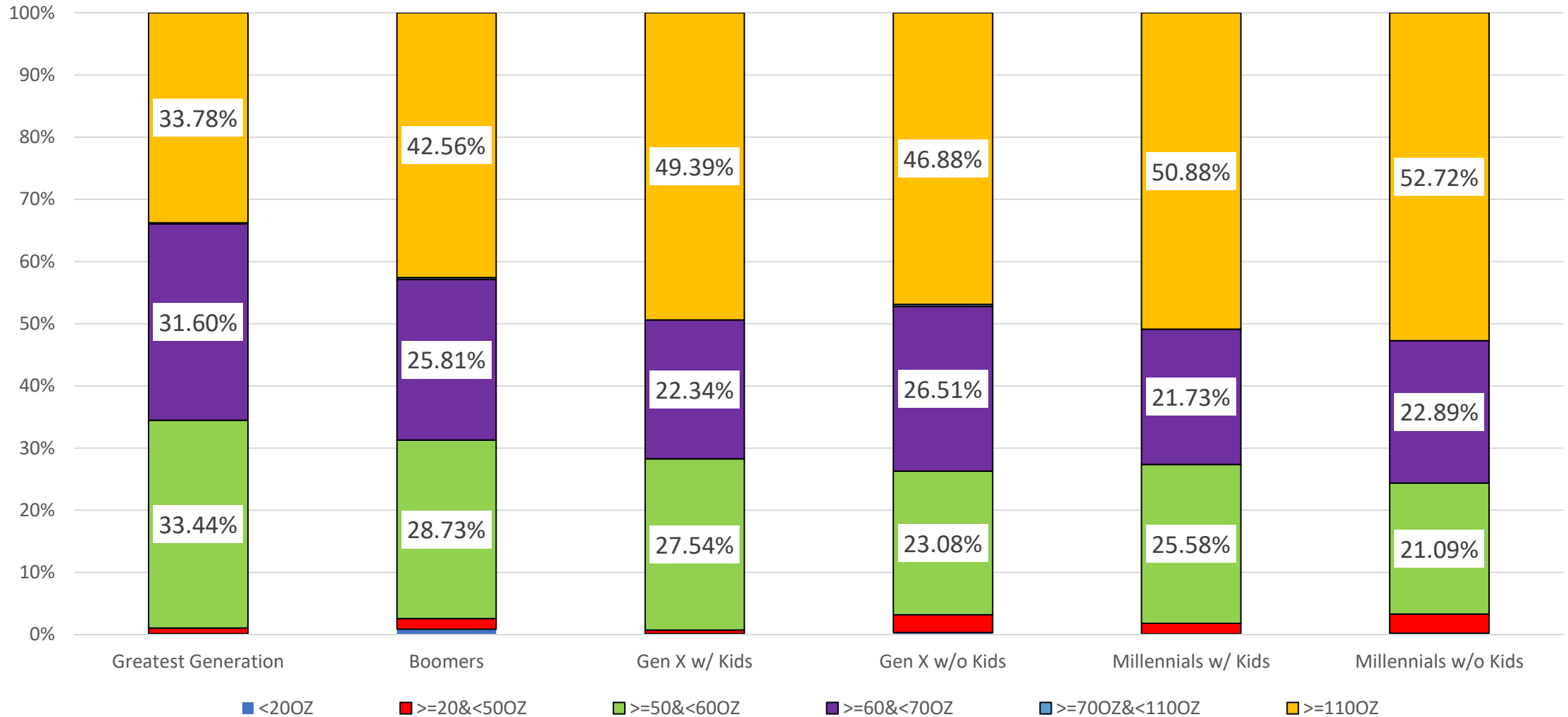
Source: Nielsen Homescan™ data for Y/E Dec 2020

OJ Recon Dollar Shares (2020)



Source: Nielsen Homescan™ data for Y/E Dec 2020

OJ Recon Volume Shares (2020)

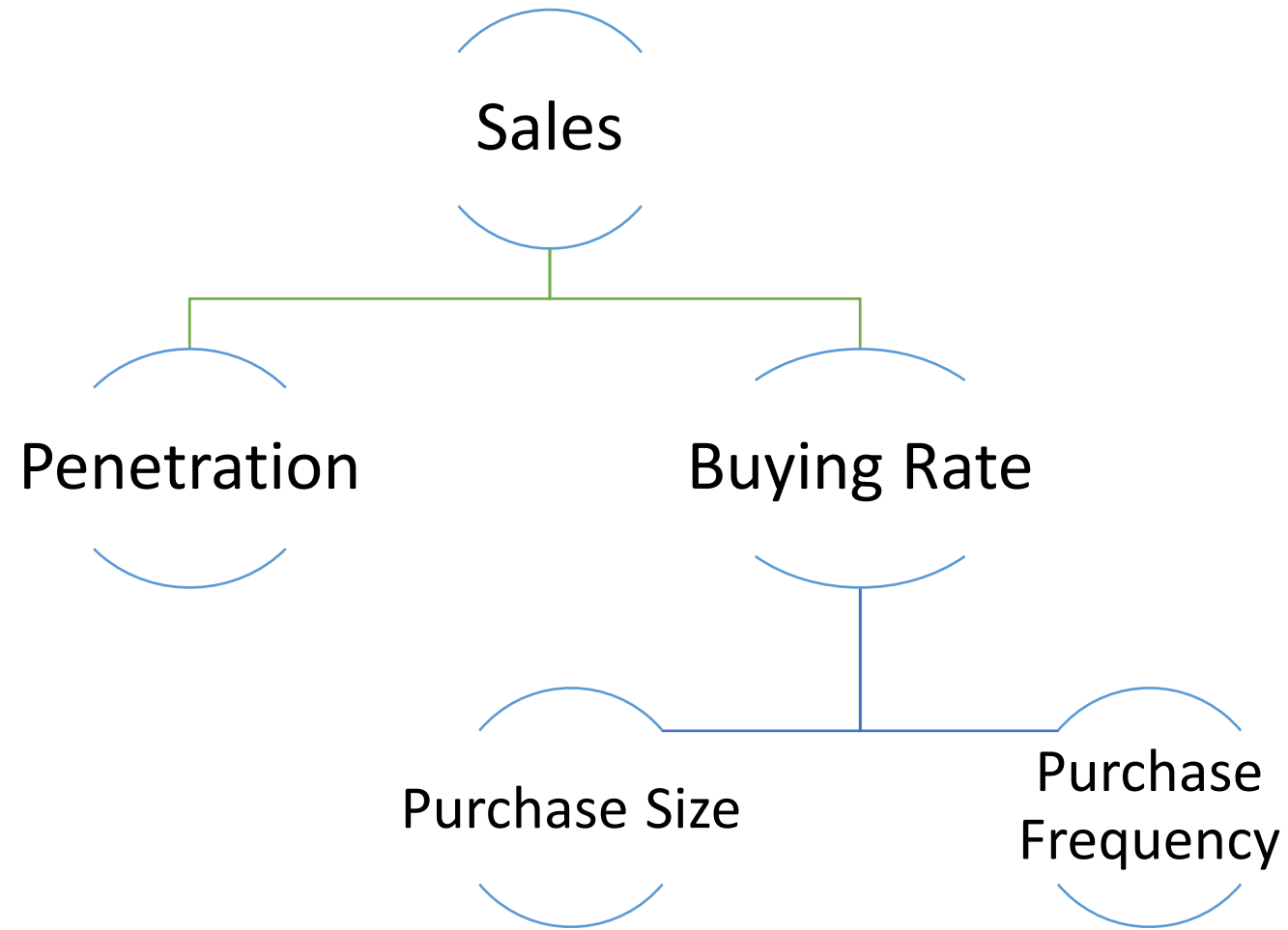


Source: Nielsen Homescan™ data for Y/E Dec 2020



Beverage Category Purchasing Overview

Nielsen Components of Product Sales

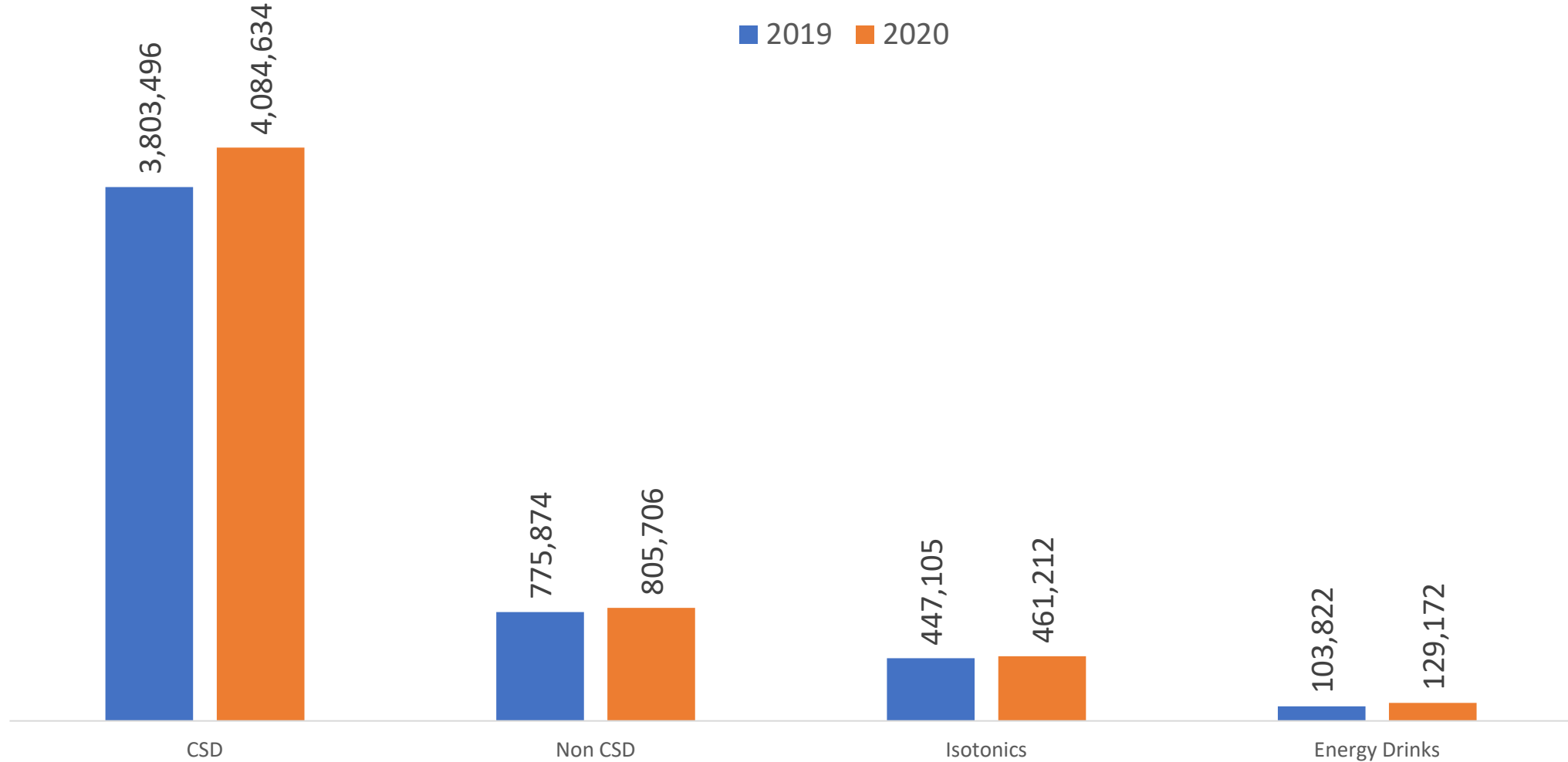


Beverage Categories

1. Soft Drinks
2. Water
3. Milk
4. Tea/Coffee
5. Fruit Drinks
6. 100% Juices

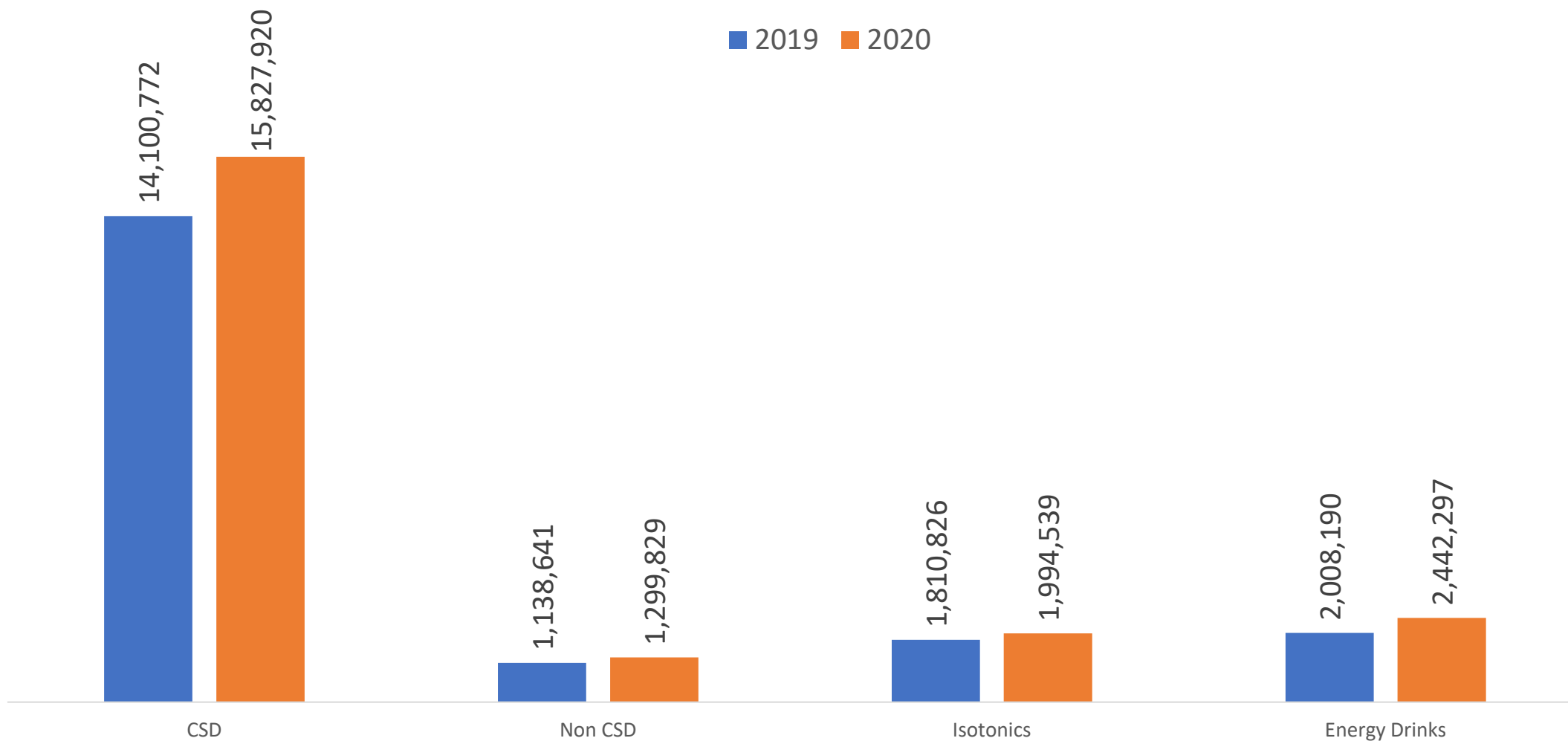


Soft Drink –Volume Sales (000)



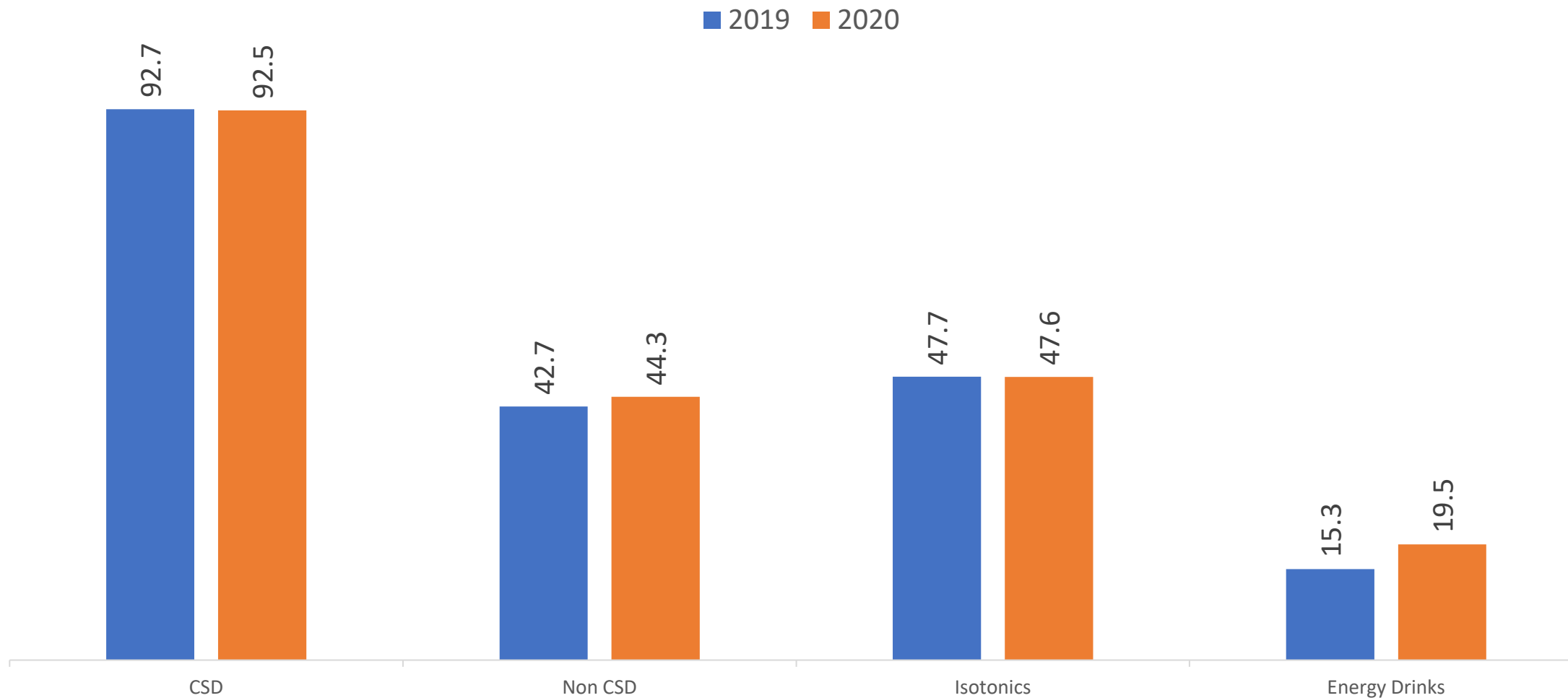
Source: Nielsen Homescan™ data for Y/E Dec 2020

Soft Drink –Dollar Sales (000)



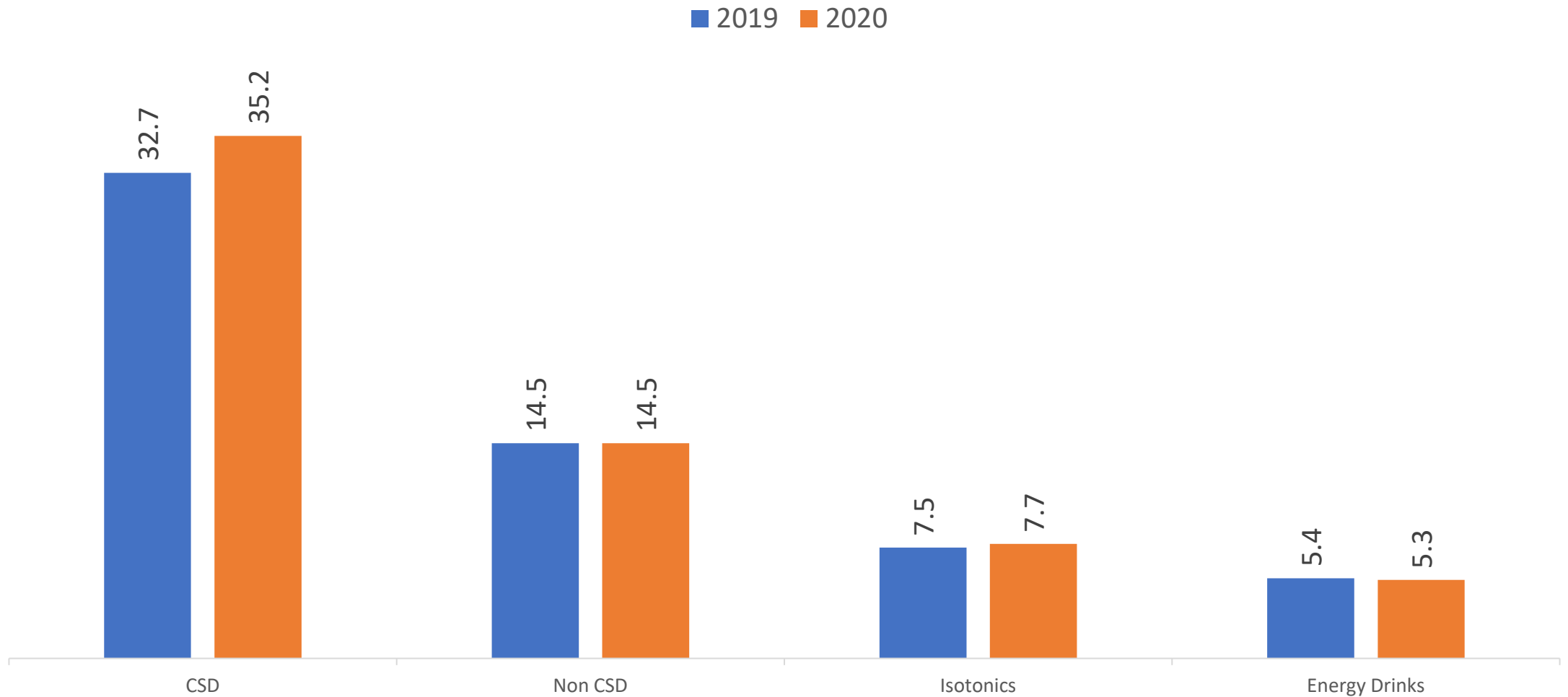
Source: Nielsen Homescan™ data for Y/E Dec 2020

Soft Drink – Penetration



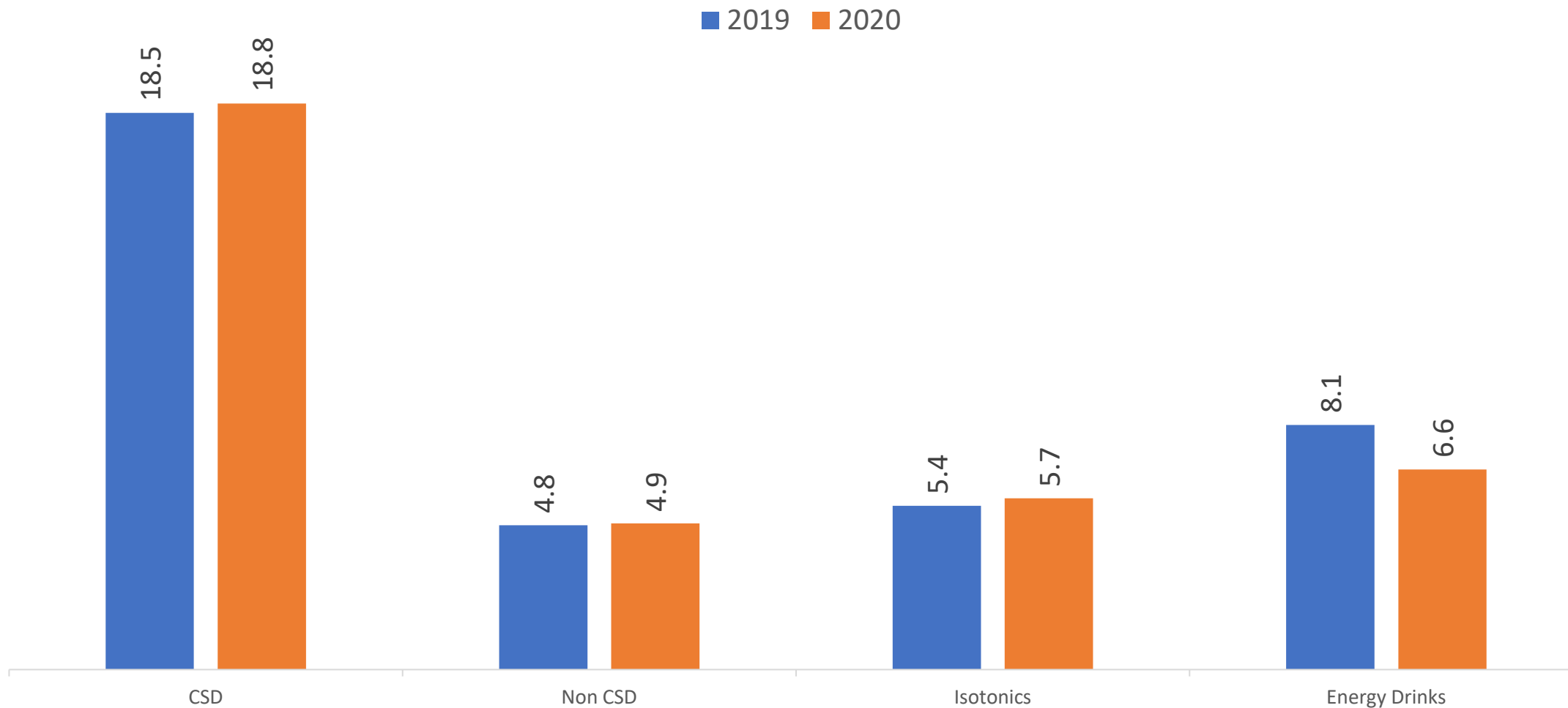
Source: Nielsen Homescan™ data for Y/E Dec 2020

Soft Drink –Buying Rate



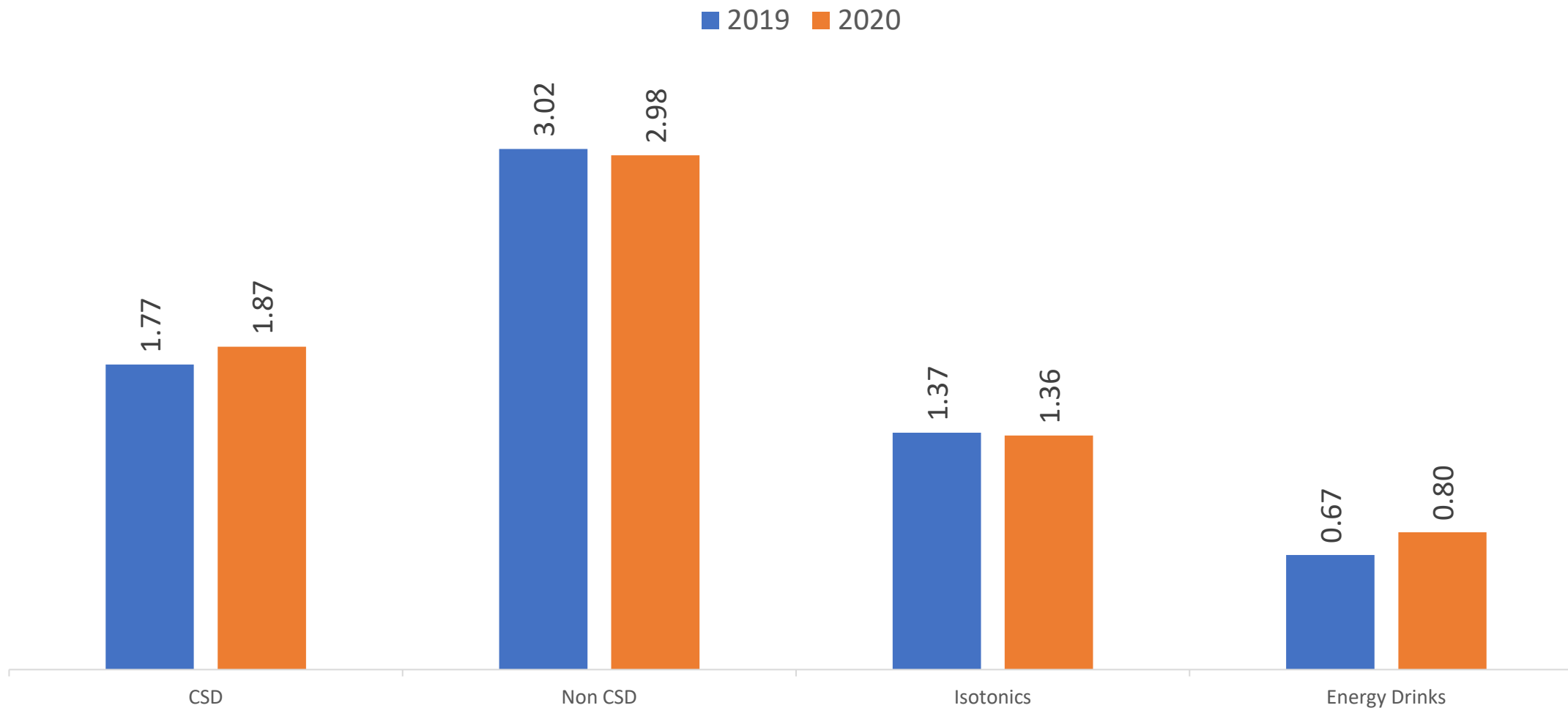
Source: Nielsen Homescan™ data for Y/E Dec 2020

Soft Drink –Purchase Frequency



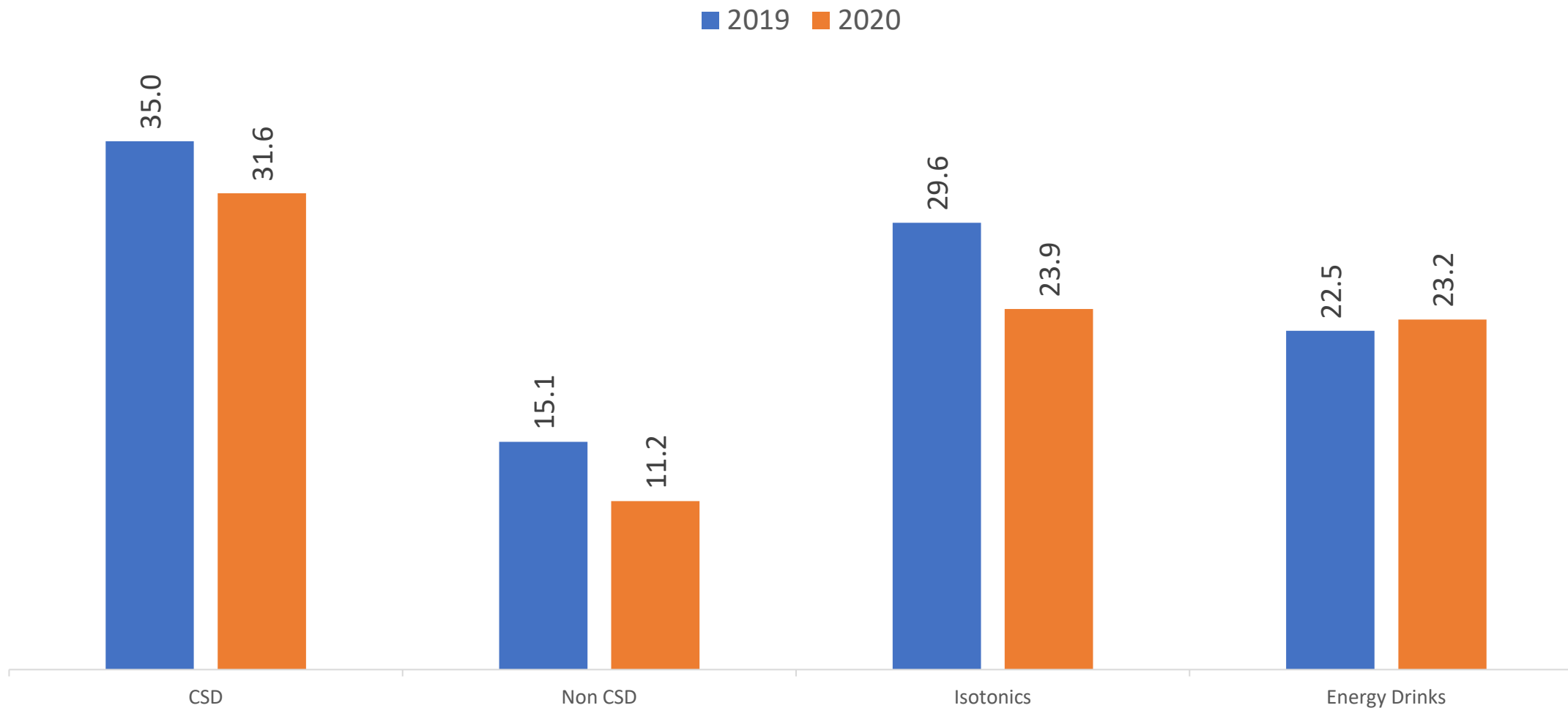
Source: Nielsen Homescan™ data for Y/E Dec 2020

Soft Drink –Purchase Size



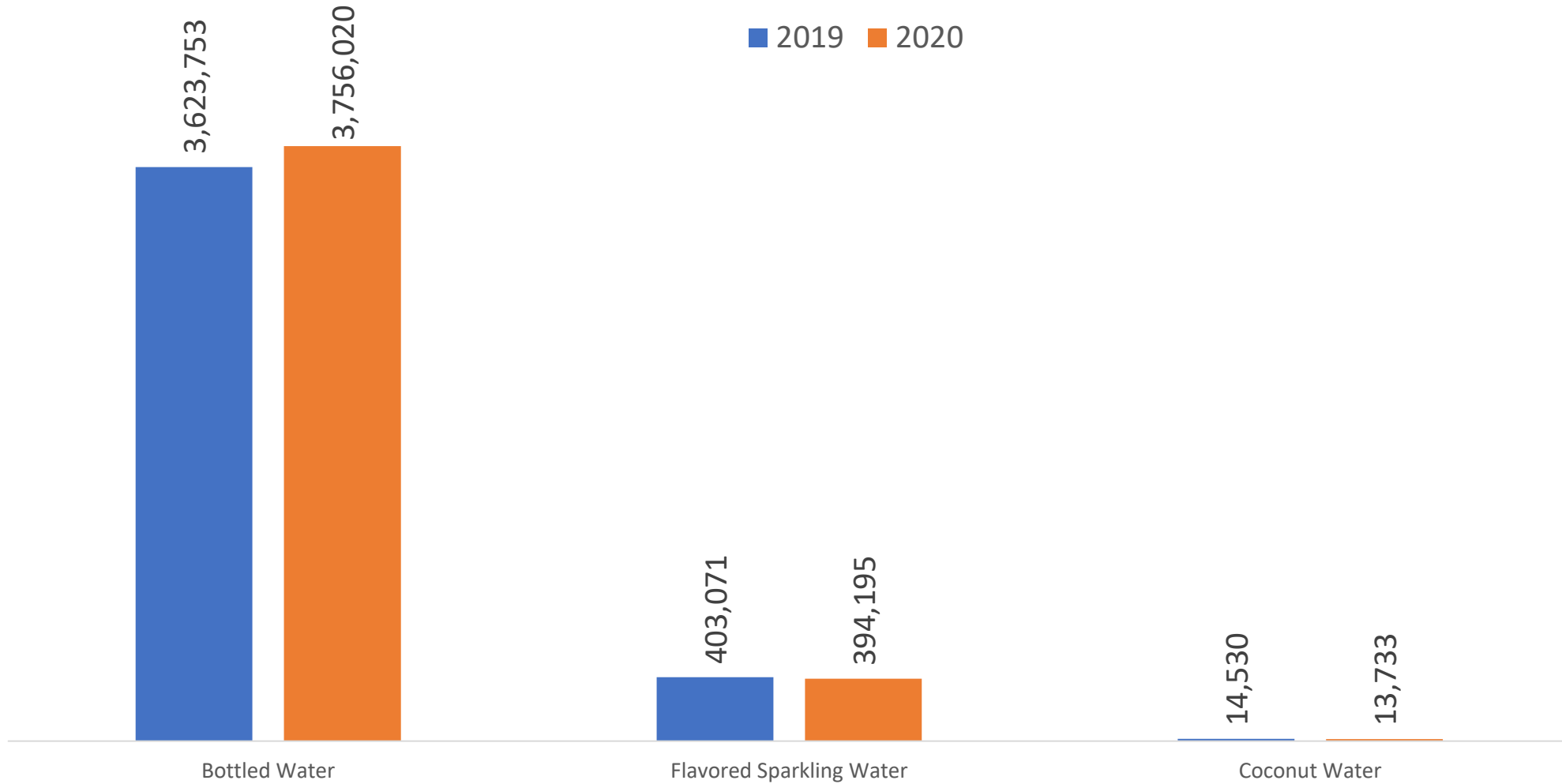
Source: Nielsen Homescan™ data for Y/E Dec 2020

Soft Drink –% Purchased on Any Perceived Deal



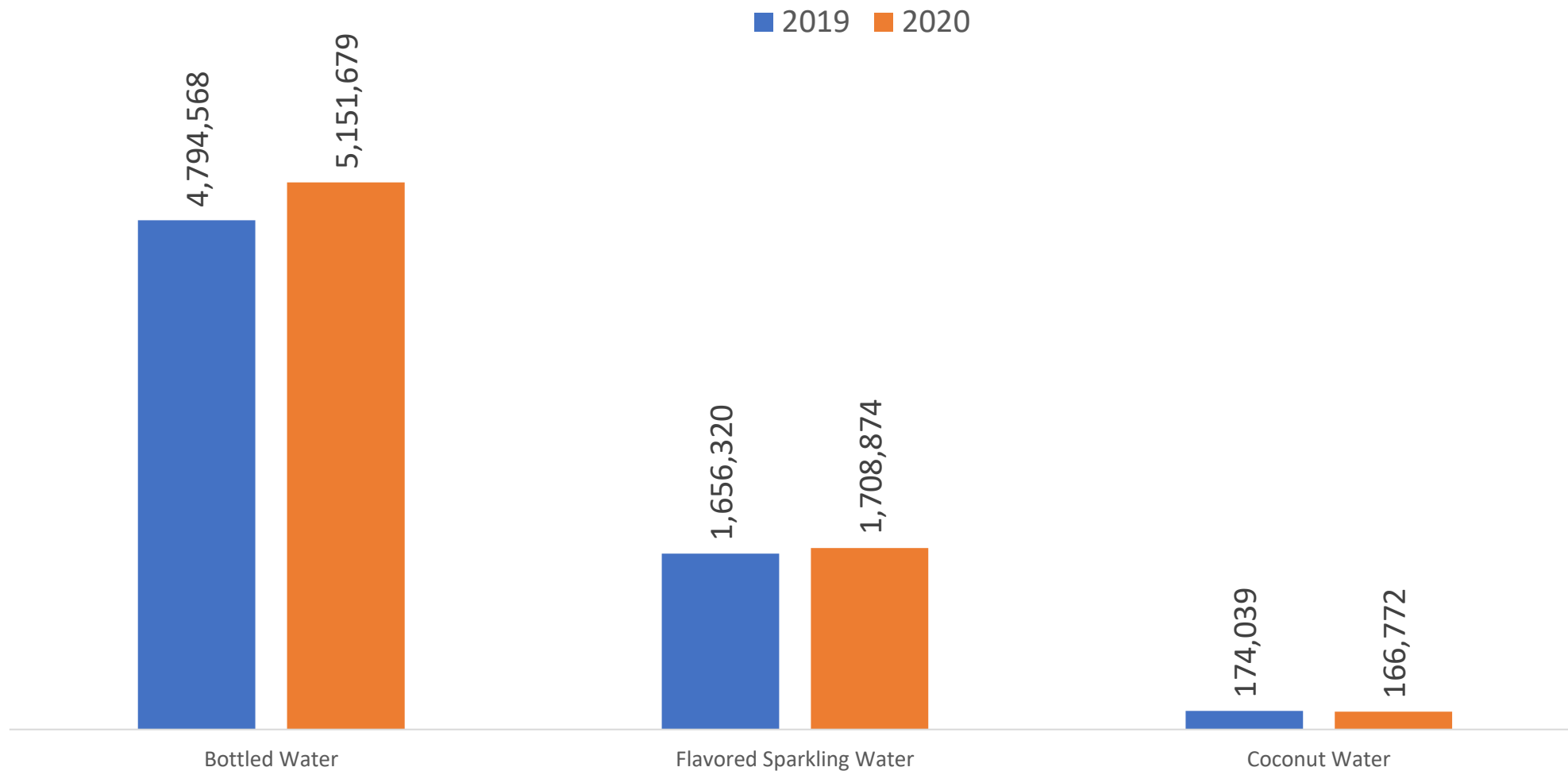
Source: Nielsen Homescan™ data for Y/E Dec 2020

Water – Volume Sales (000)



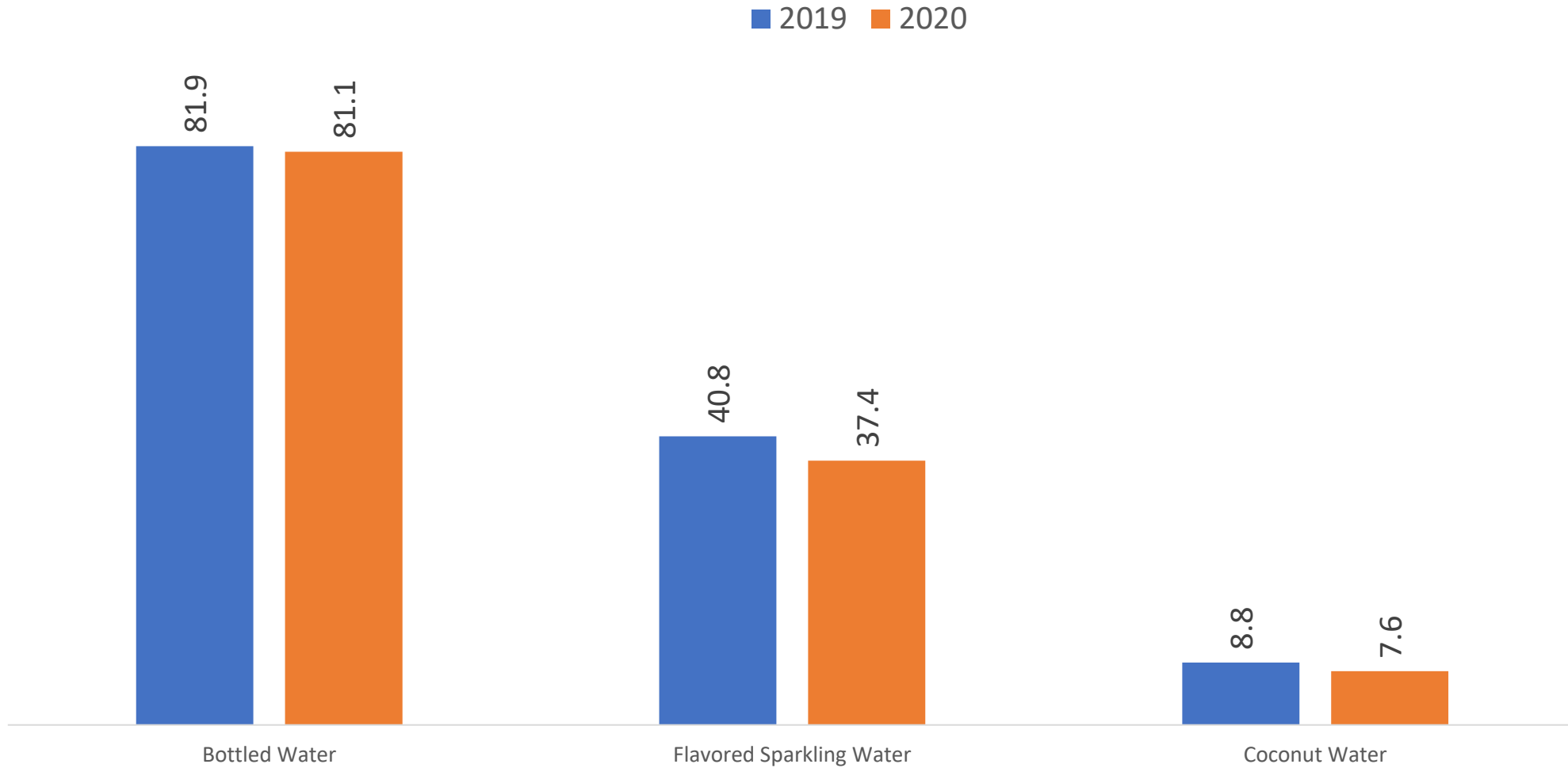
Source: Nielsen Homescan™ data for Y/E Dec 2020

Water –Dollar Sales (000)



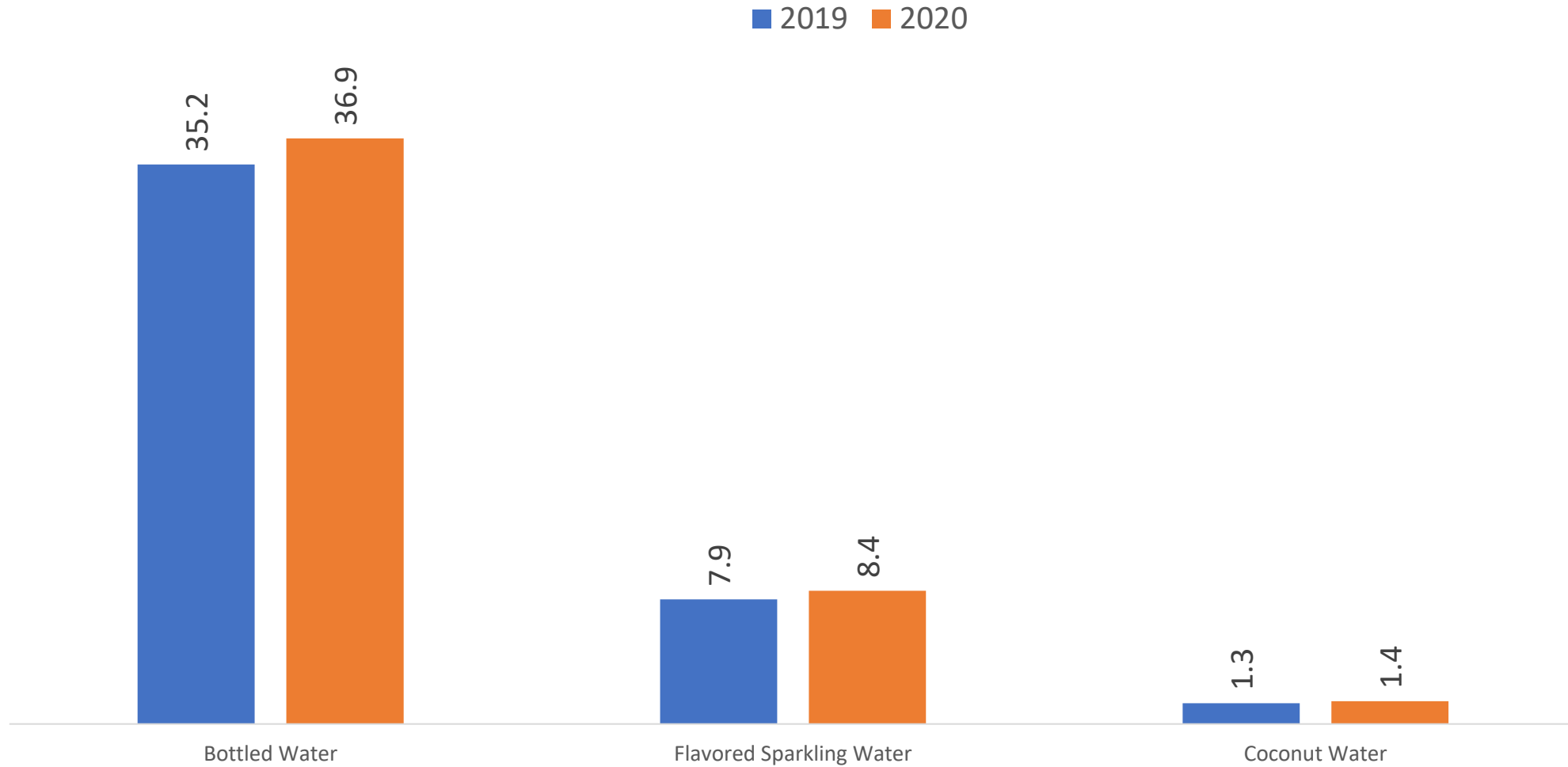
Source: Nielsen Homescan™ data for Y/E Dec 2020

Water – Penetration



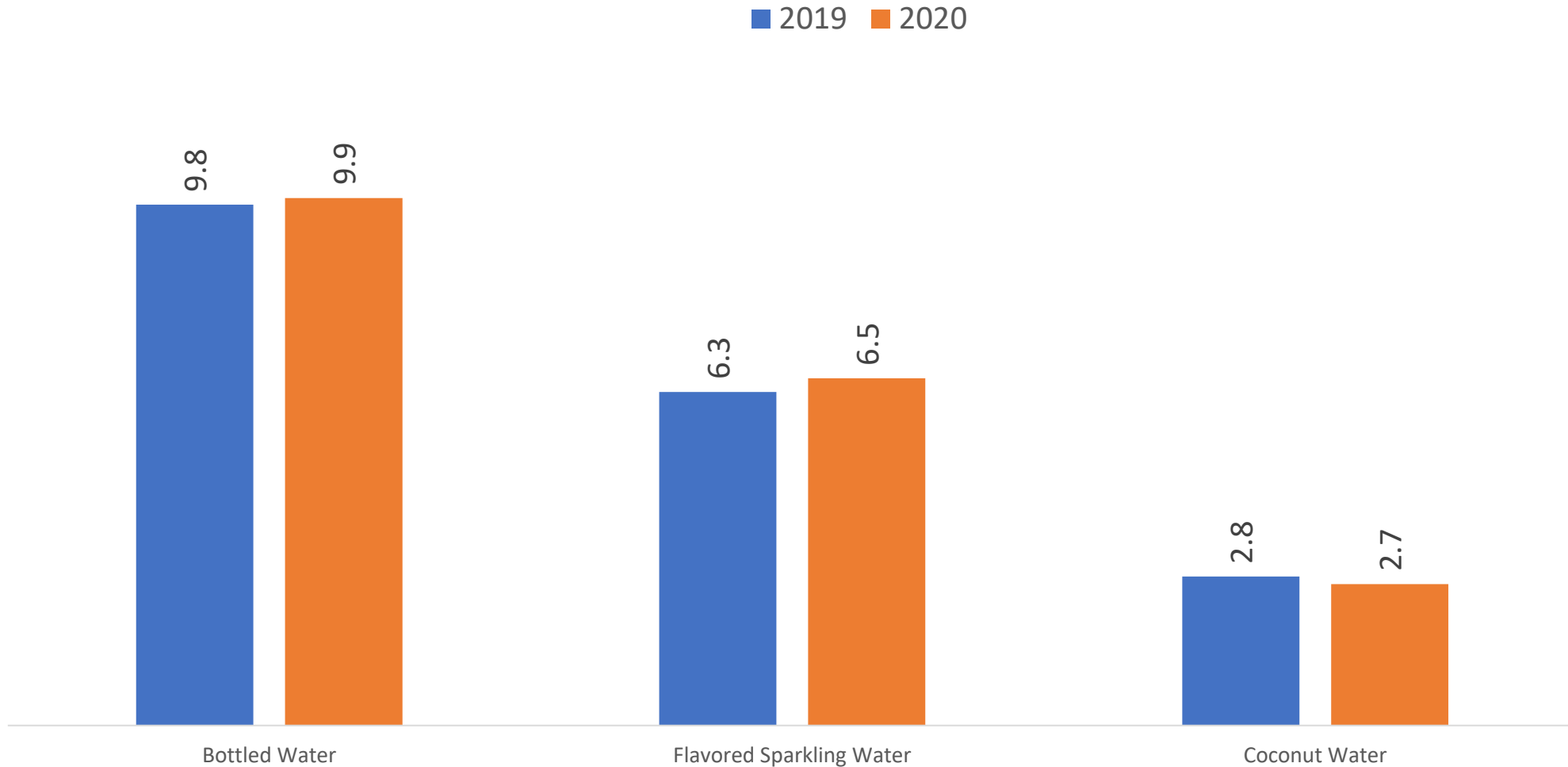
Source: Nielsen Homescan™ data for Y/E Dec 2020

Water –Buying Rate



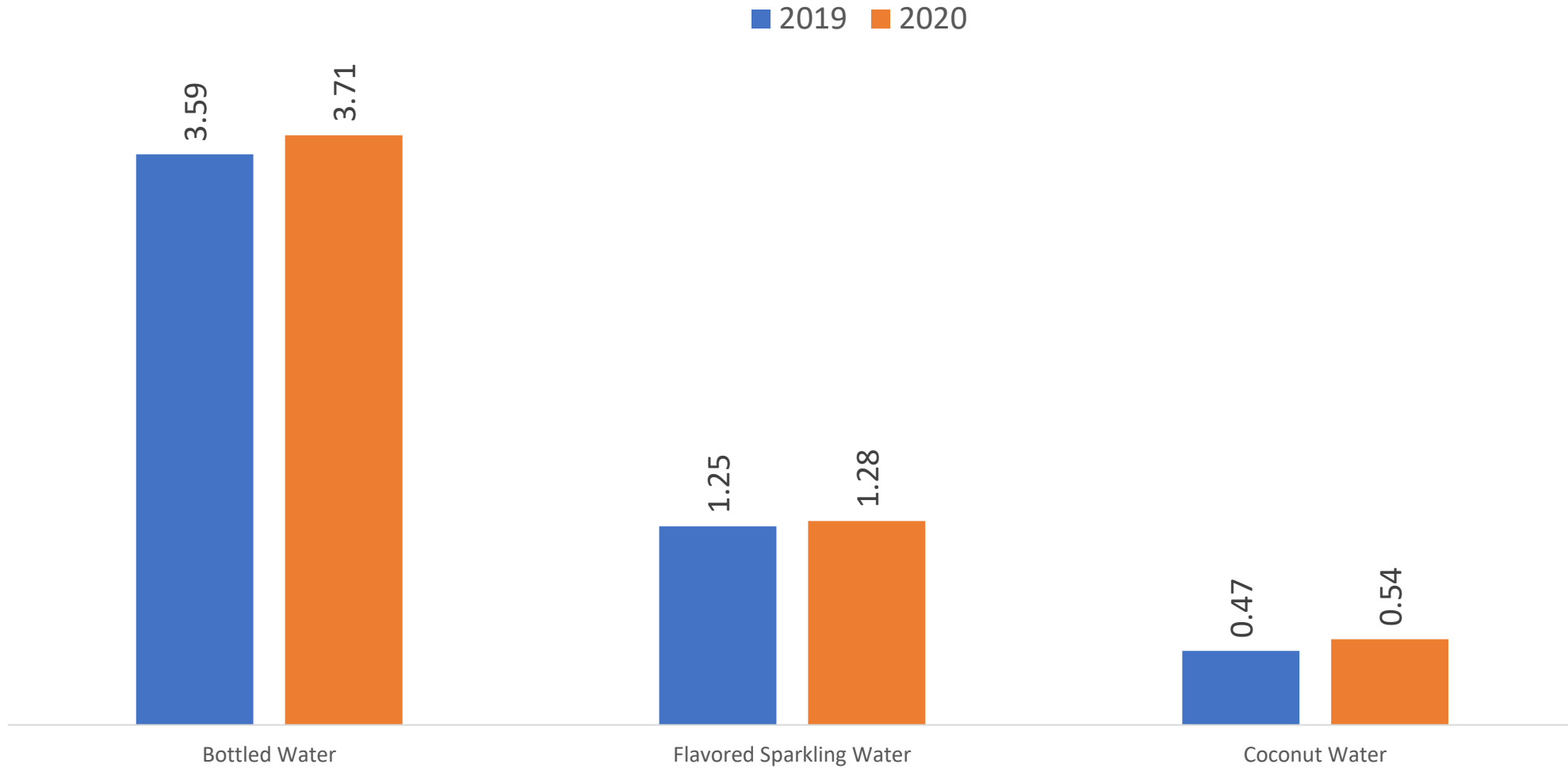
Source: Nielsen Homescan™ data for Y/E Dec 2020

Water –Purchase Frequency



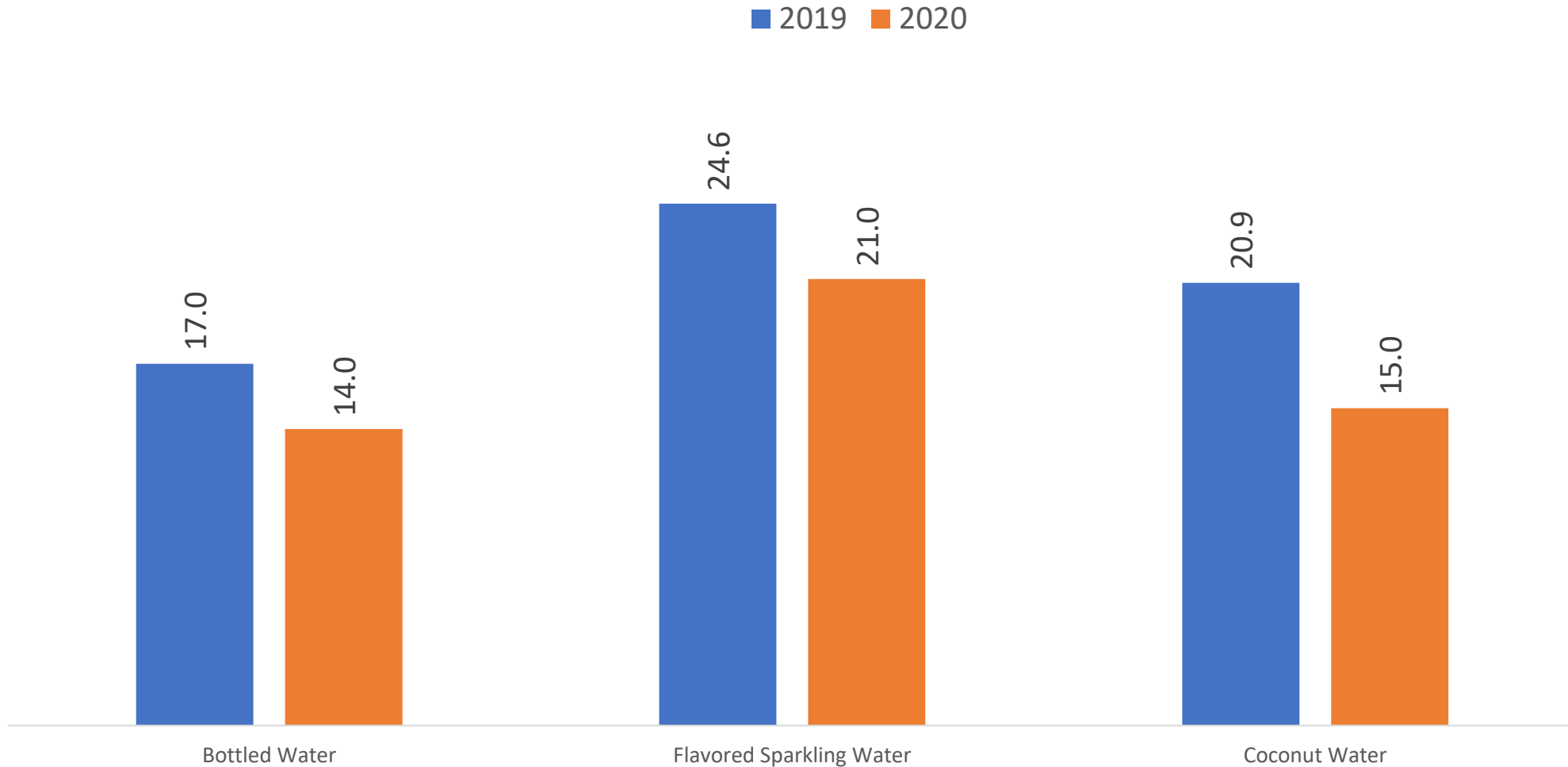
Source: Nielsen Homescan™ data for Y/E Dec 2020

Water –Purchase Size



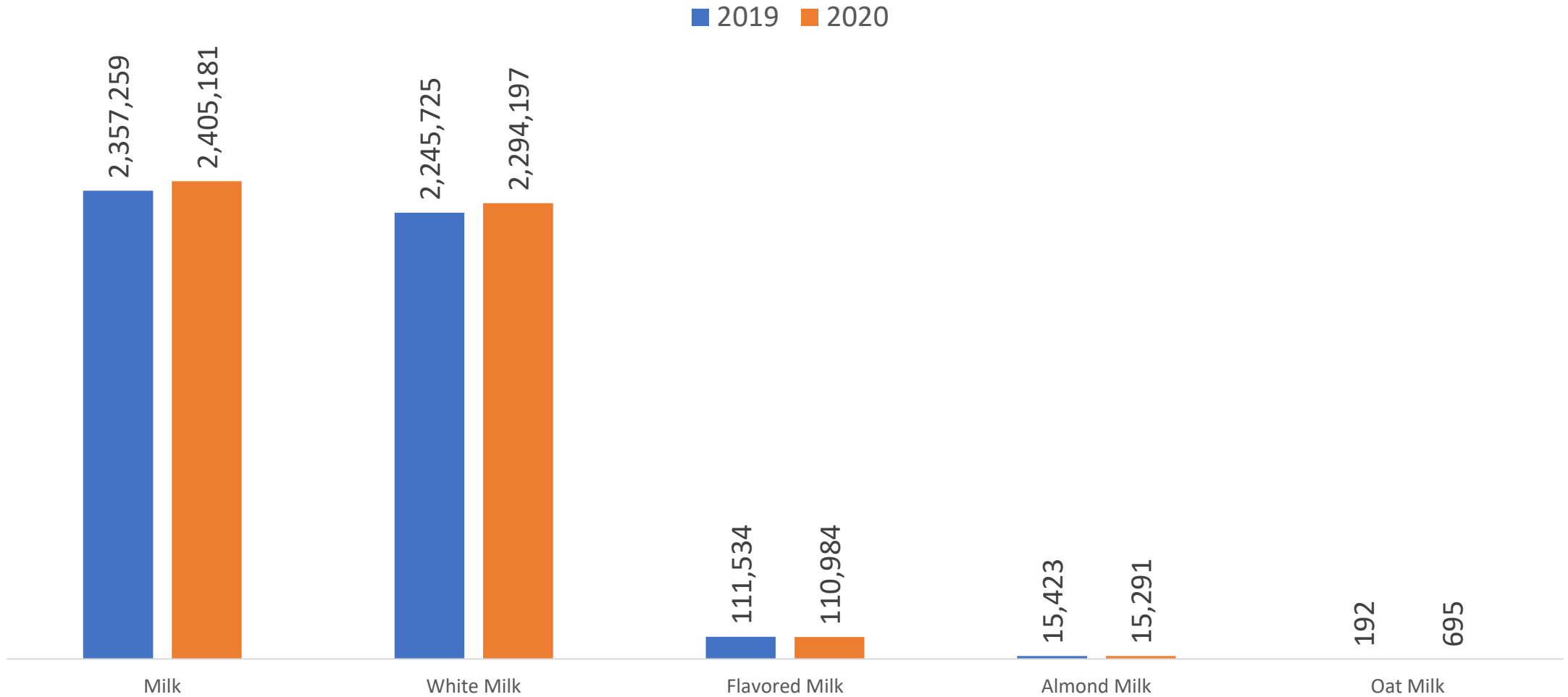
Source: Nielsen Homescan™ data for Y/E Dec 2020

Water –% Purchased on Any Perceived Deal



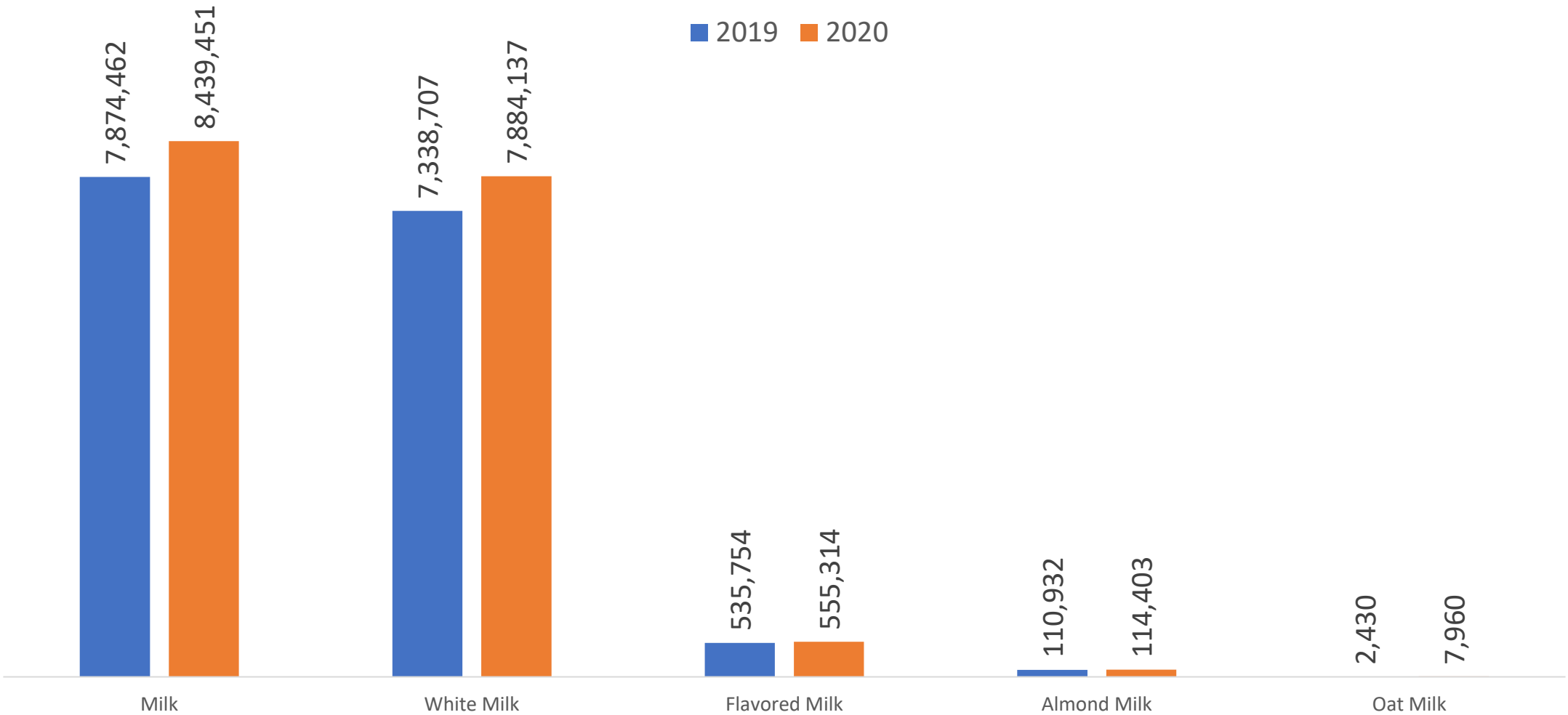
Source: Nielsen Homescan™ data for Y/E Dec 2020

Milk – Volume Sales (000)



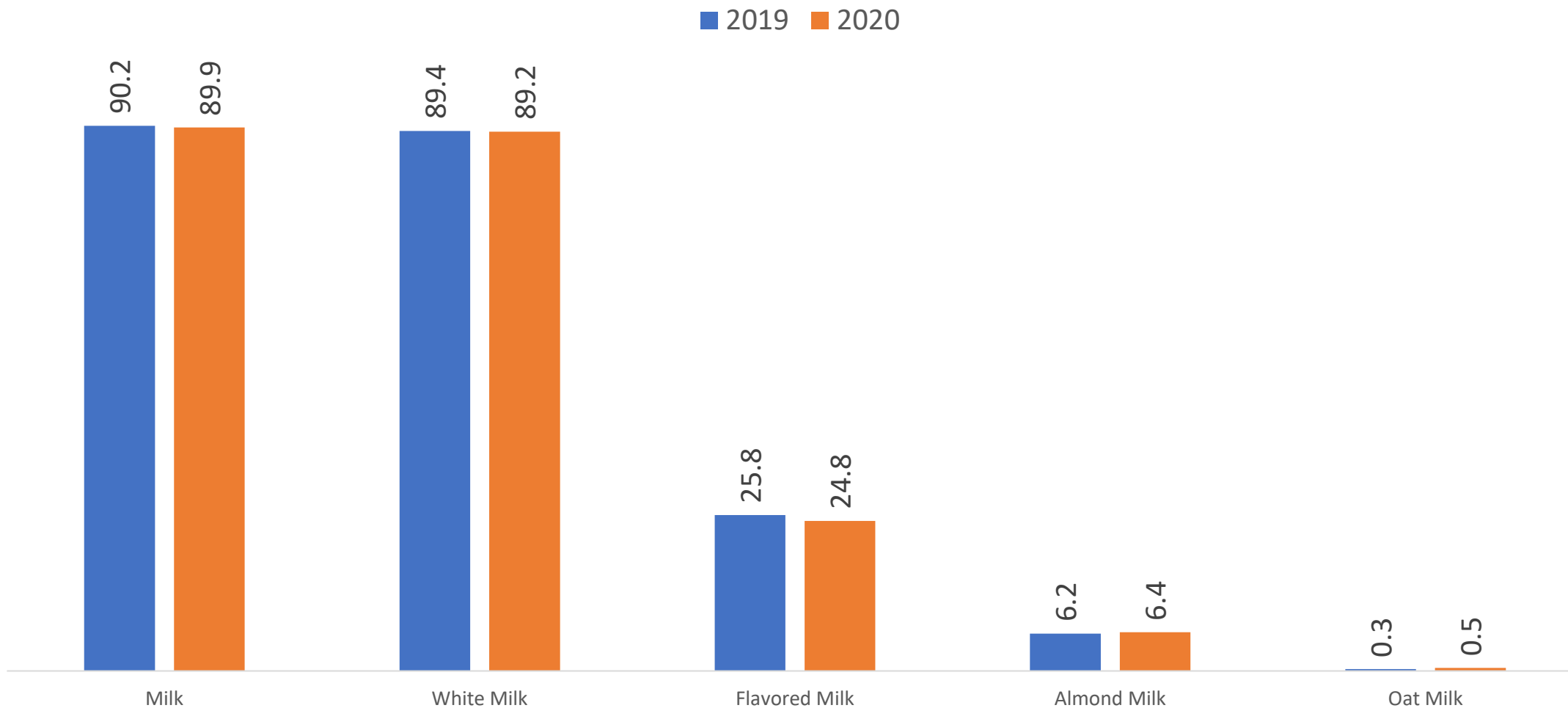
Source: Nielsen Homescan™ data for Y/E Dec 2020

Milk –Dollar Sales (000)



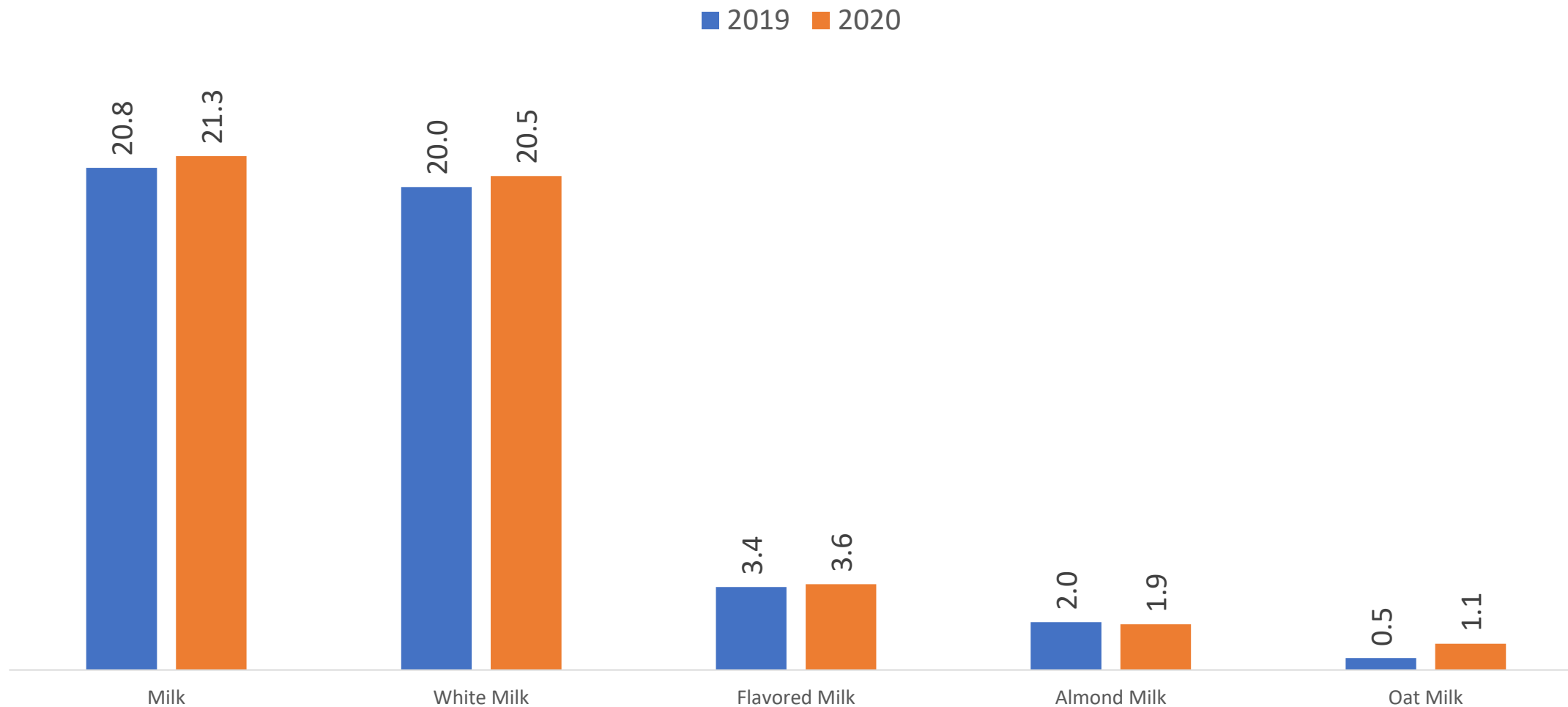
Source: Nielsen Homescan™ data for Y/E Dec 2020

Milk – Penetration



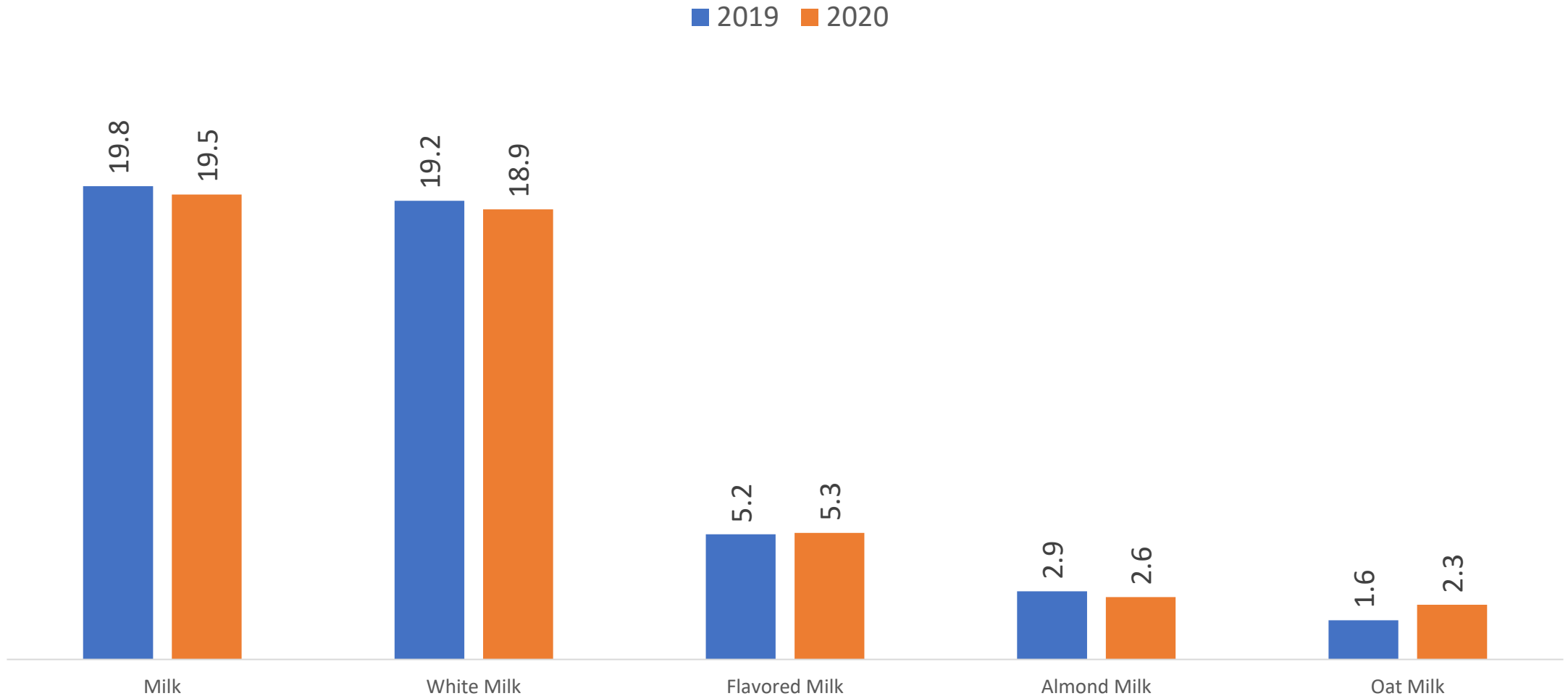
Source: Nielsen Homescan™ data for Y/E Dec 2020

Milk –Buying Rate



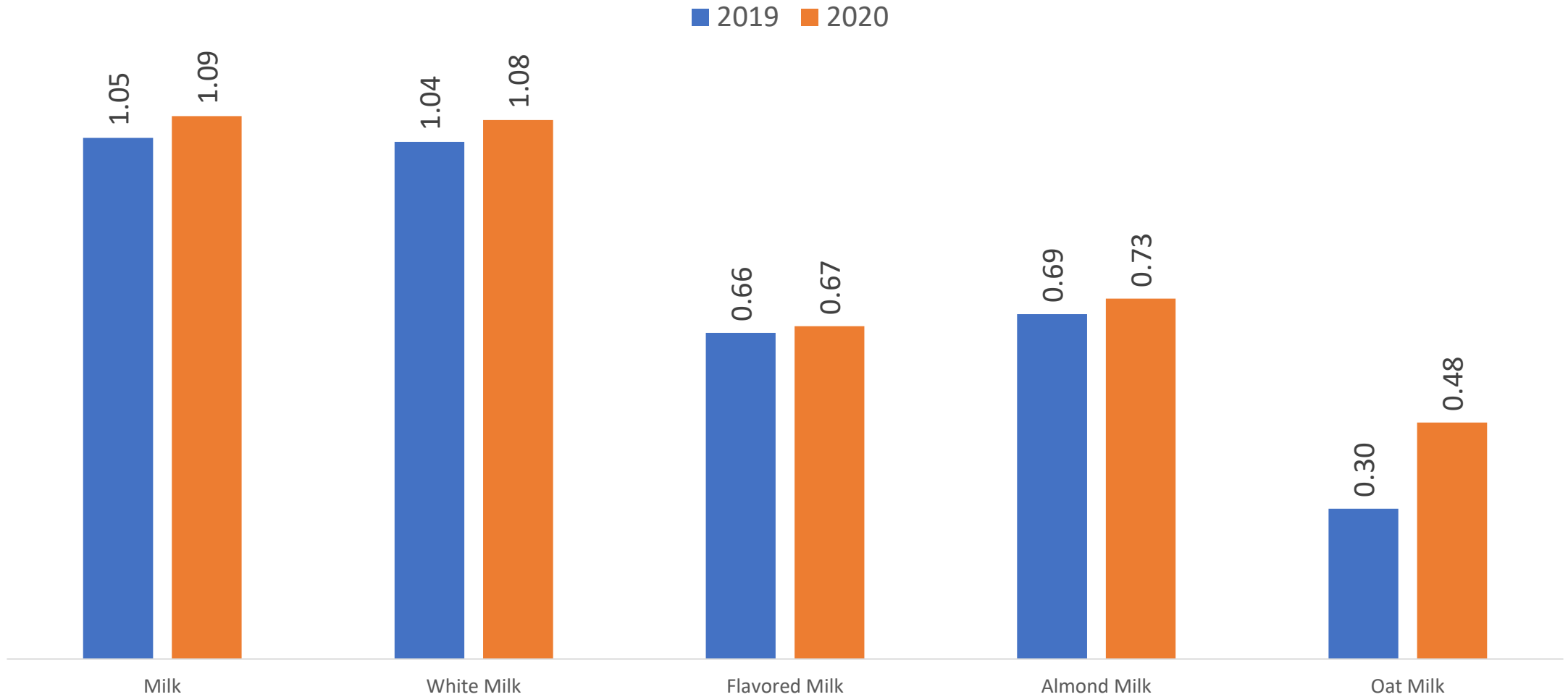
Source: Nielsen Homescan™ data for Y/E Dec 2020

Milk –Purchase Frequency



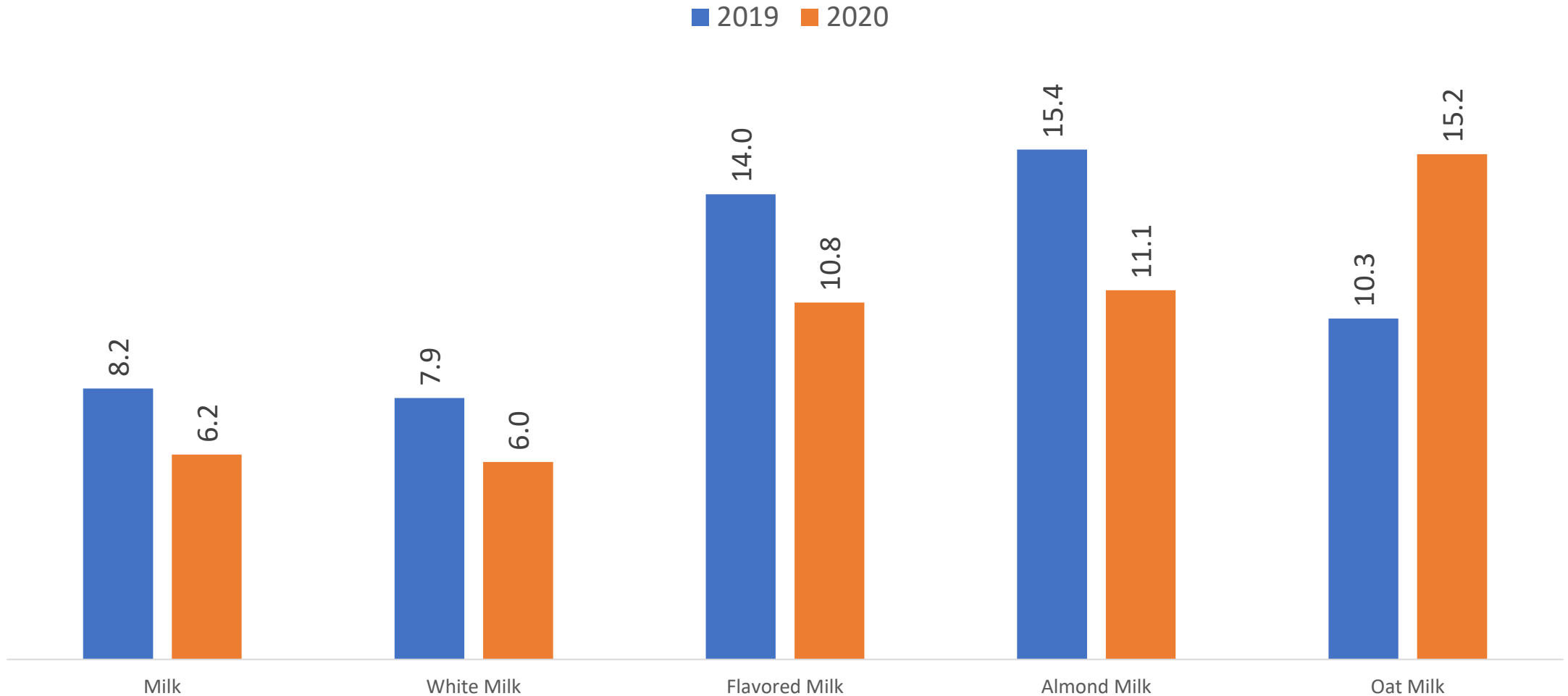
Source: Nielsen Homescan™ data for Y/E Dec 2020

Milk –Purchase Size



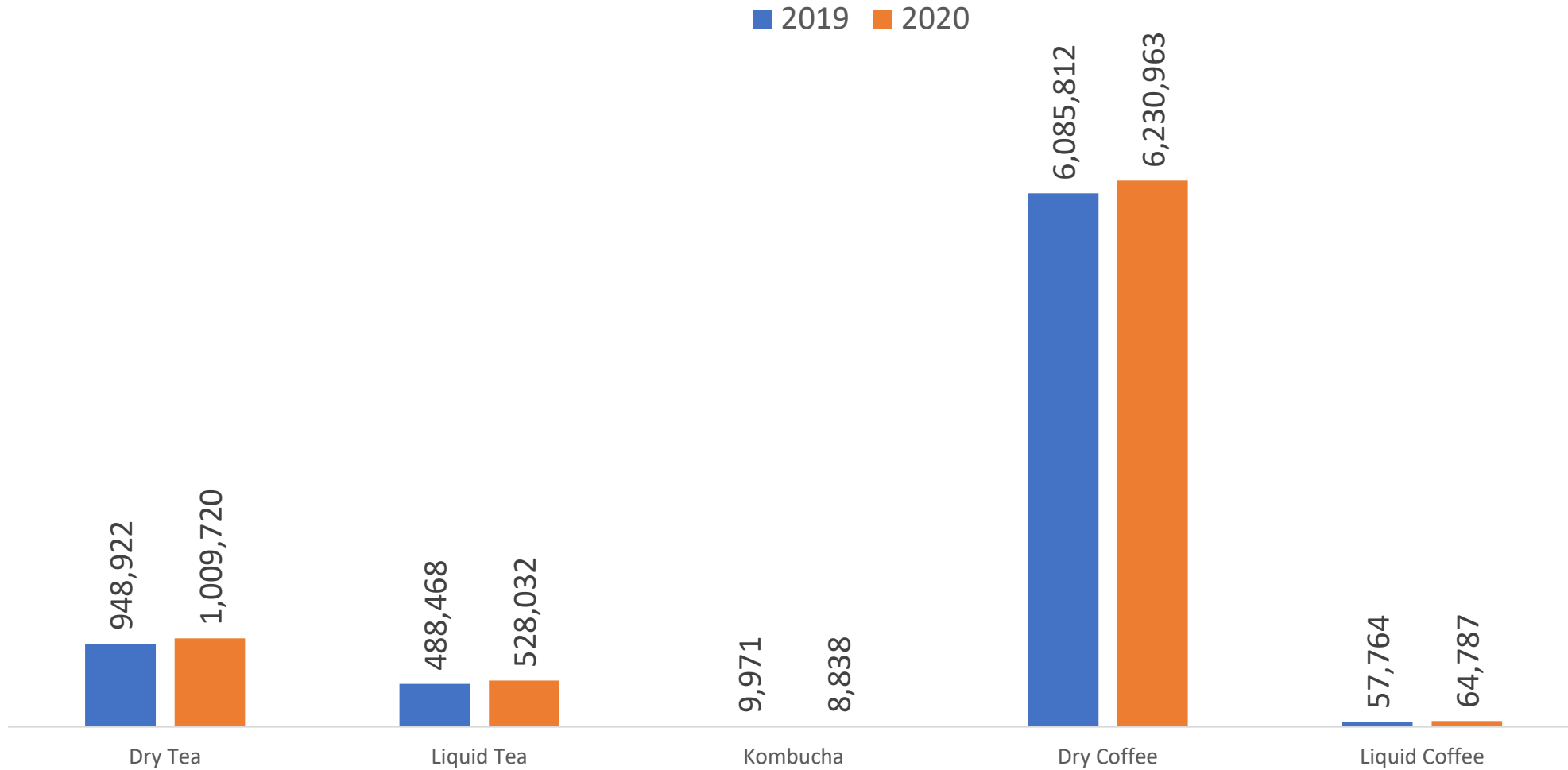
Source: Nielsen Homescan™ data for Y/E Dec 2020

Milk –% Purchased on Any Perceived Deal



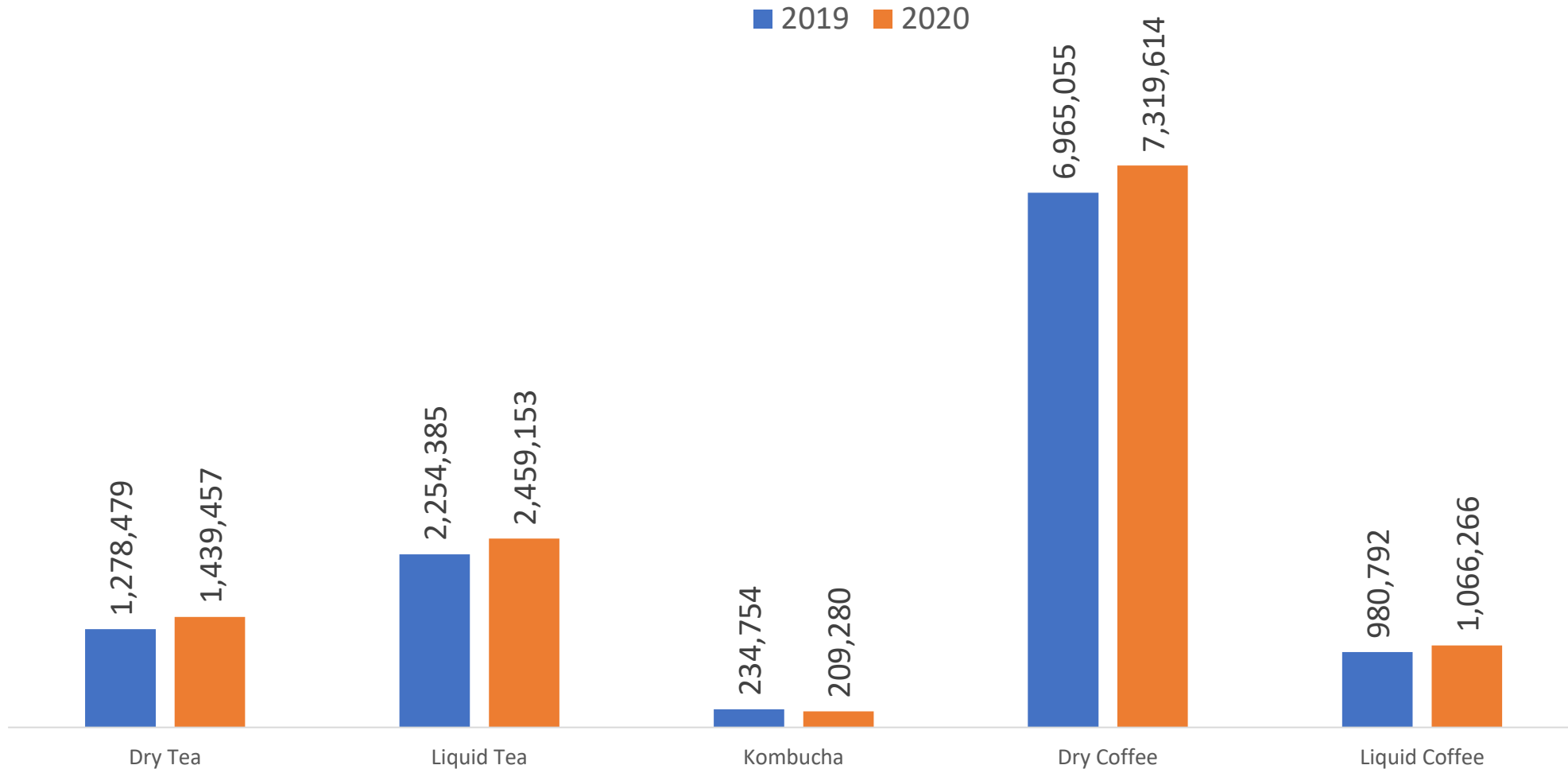
Source: Nielsen Homescan™ data for Y/E Dec 2020

Tea/Coffee –Volume Sales (000)



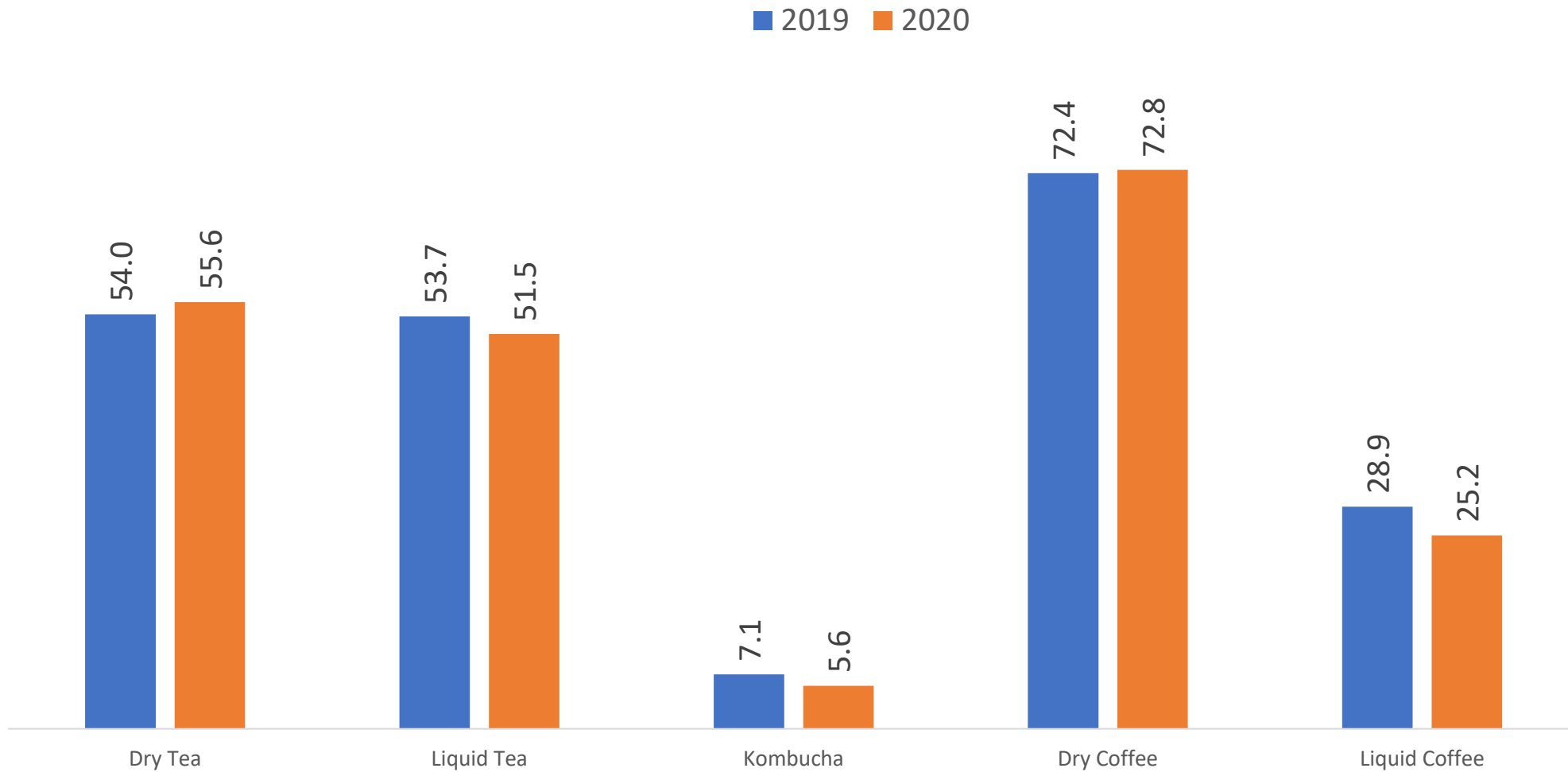
Source: Nielsen Homescan™ data for Y/E Dec 2020

Tea/Coffee –Dollar Sales (000)



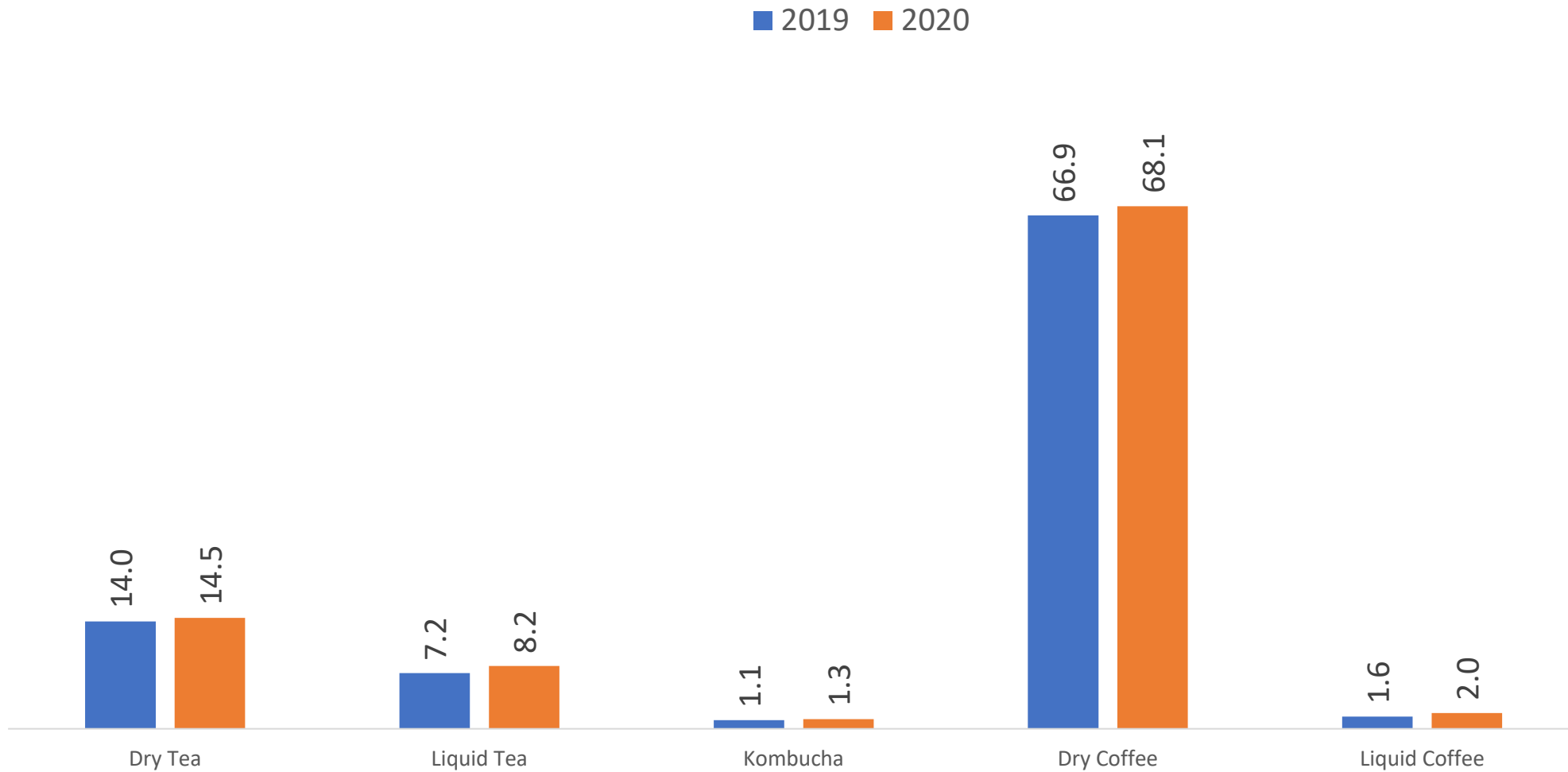
Source: Nielsen Homescan™ data for Y/E Dec 2020

Tea/Coffee – Penetration



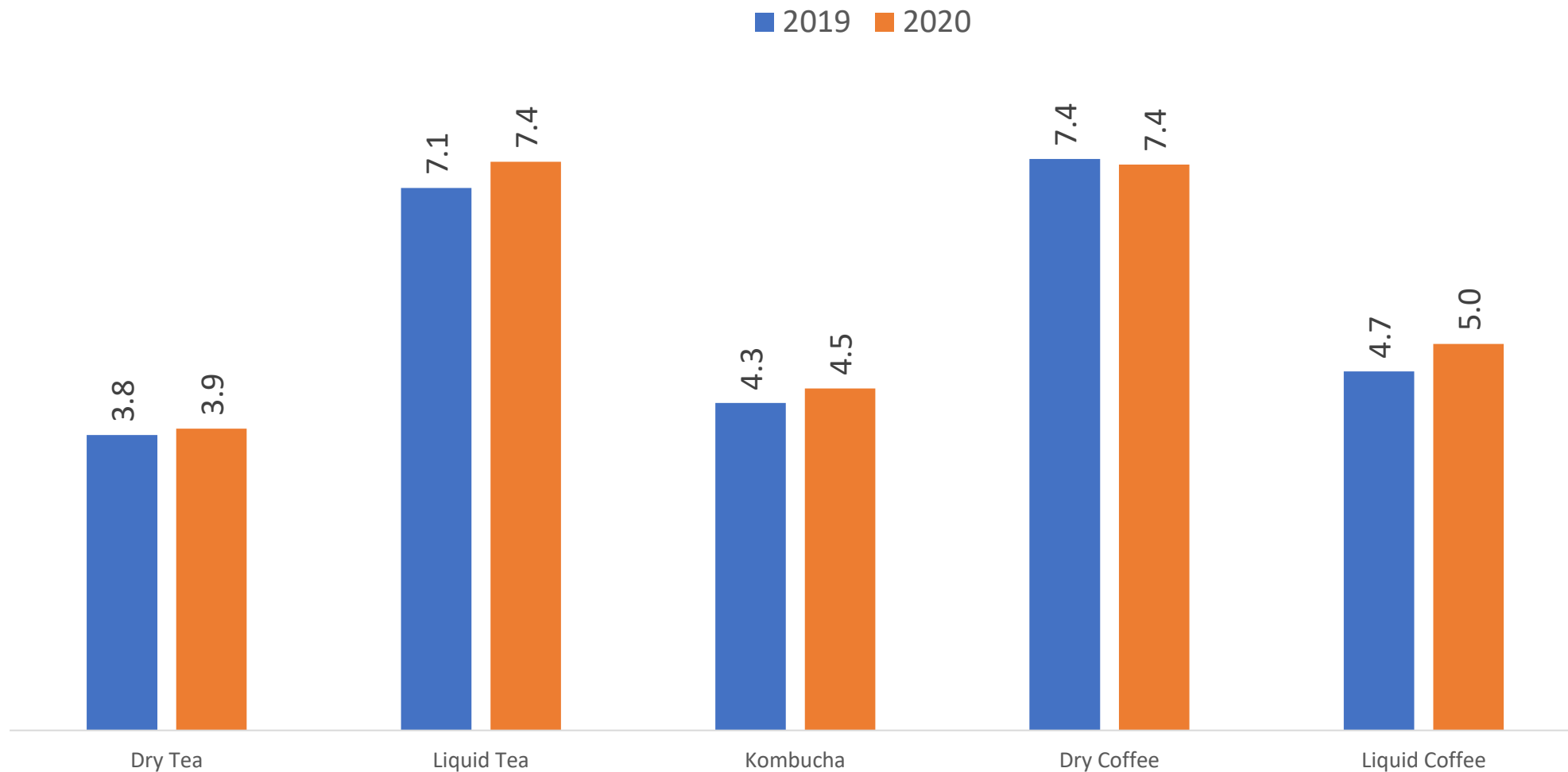
Source: Nielsen Homescan™ data for Y/E Dec 2020

Tea/Coffee –Buying Rate



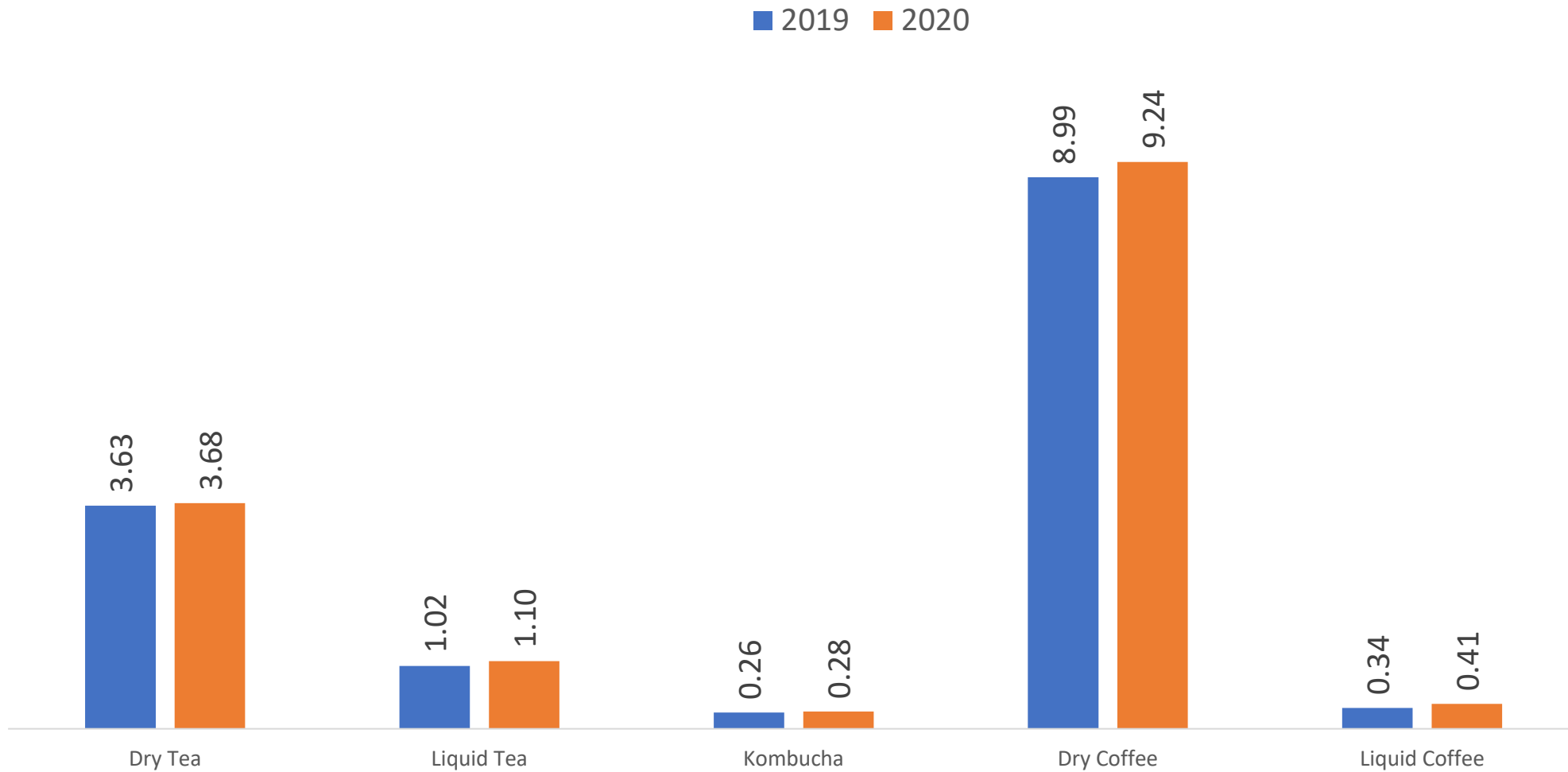
Source: Nielsen Homescan™ data for Y/E Dec 2020

Tea/Coffee –Purchase Frequency



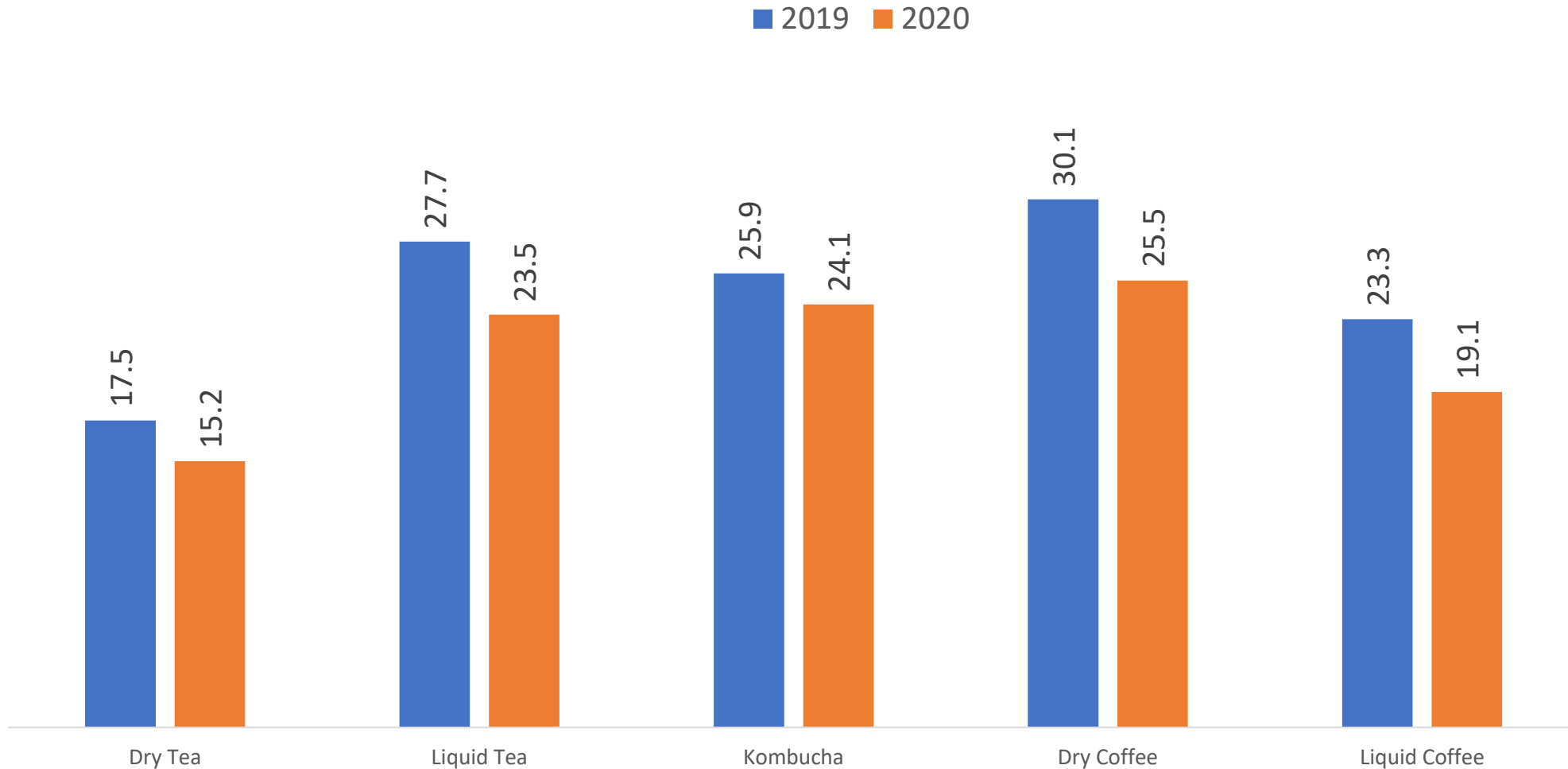
Source: Nielsen Homescan™ data for Y/E Dec 2020

Tea/Coffee –Purchase Size



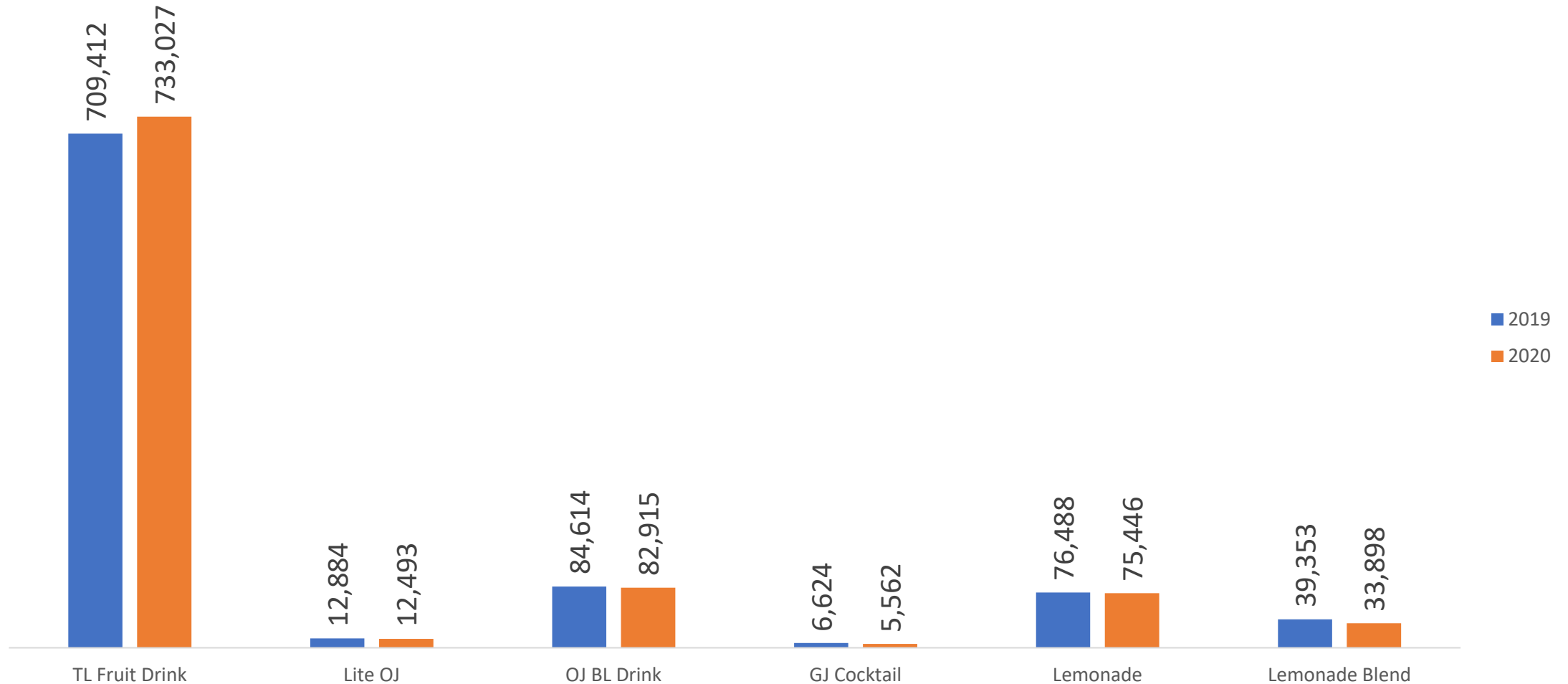
Source: Nielsen Homescan™ data for Y/E Dec 2020

Tea/Coffee –% Purchased on Any Perceived Deal



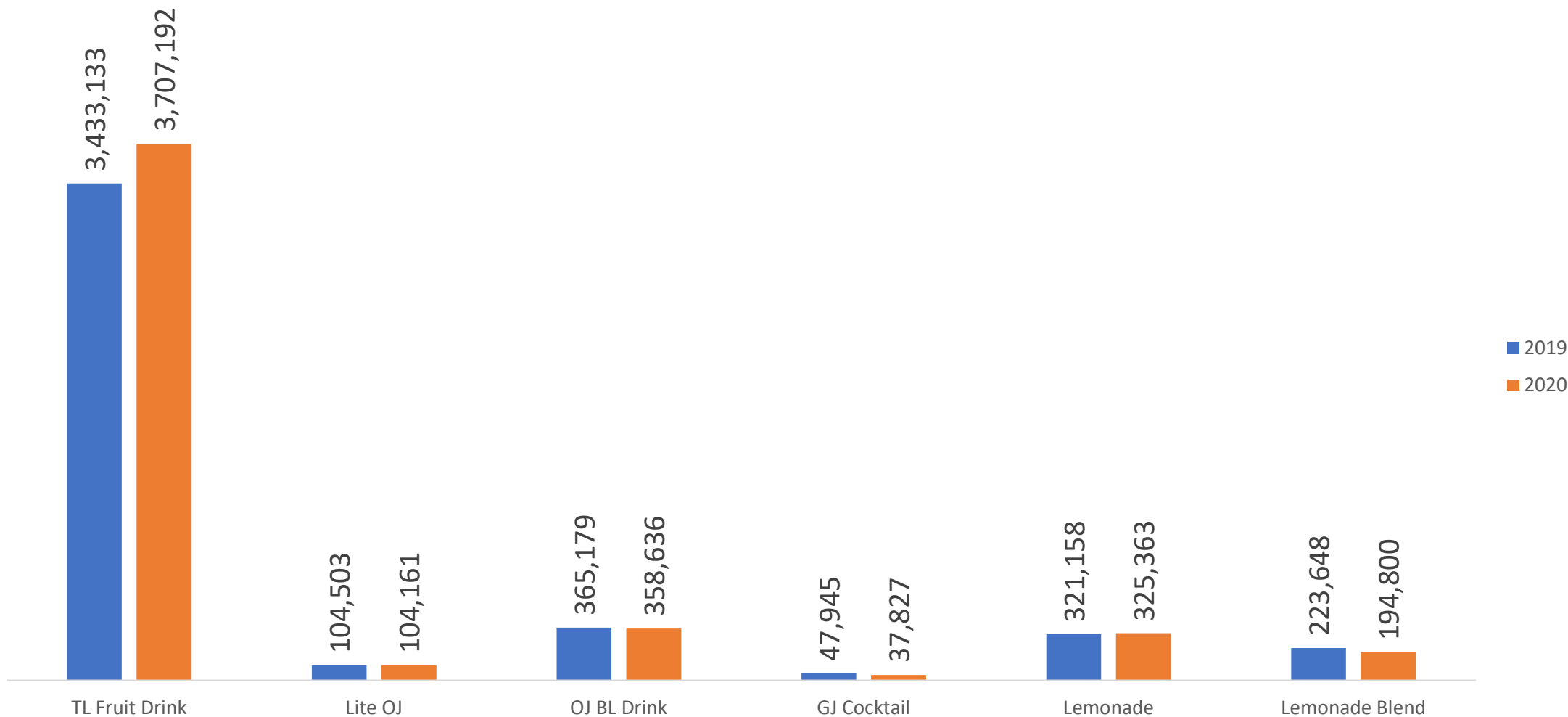
Source: Nielsen Homescan™ data for Y/E Dec 2020

Fruit Drink –Volume Sales (000)



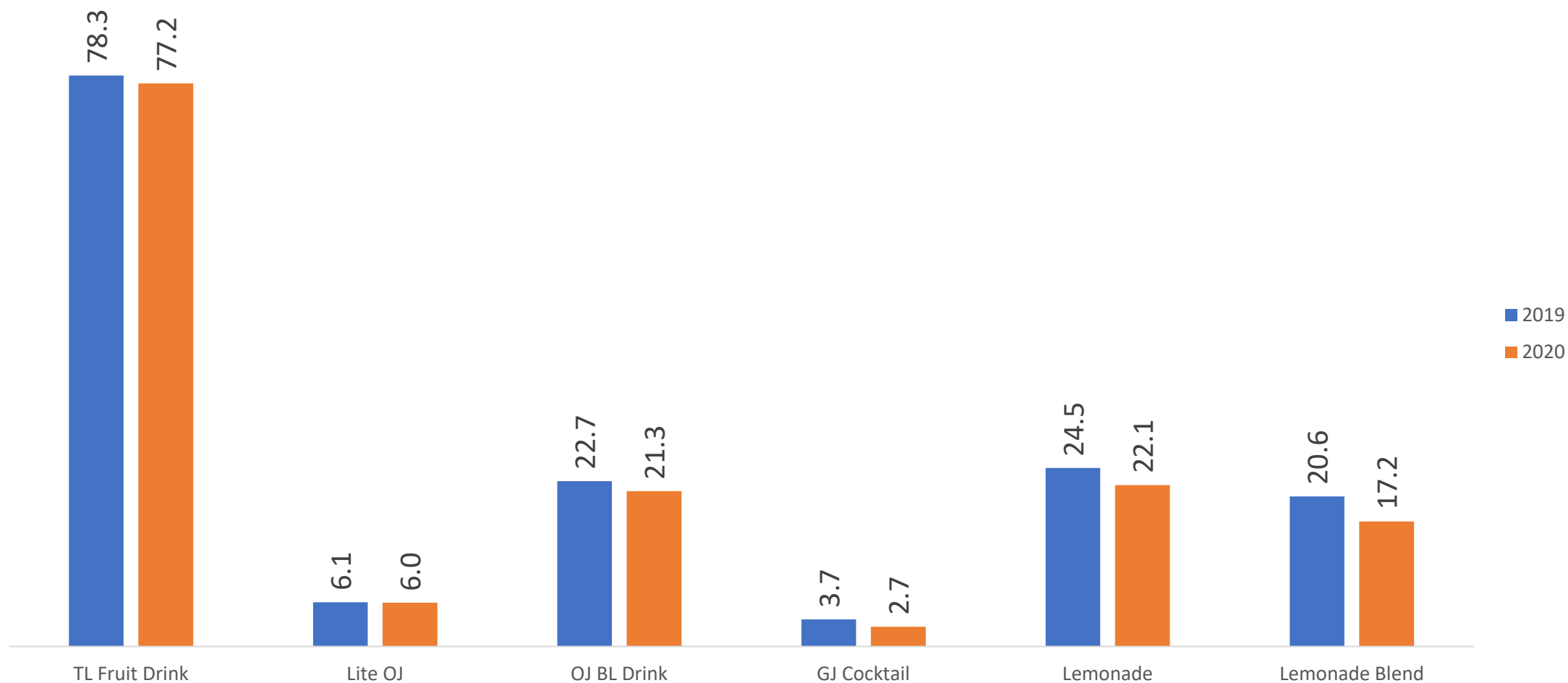
Source: Nielsen Homescan™ data for Y/E Dec 2020

Fruit Drink –Dollar Sales (000)



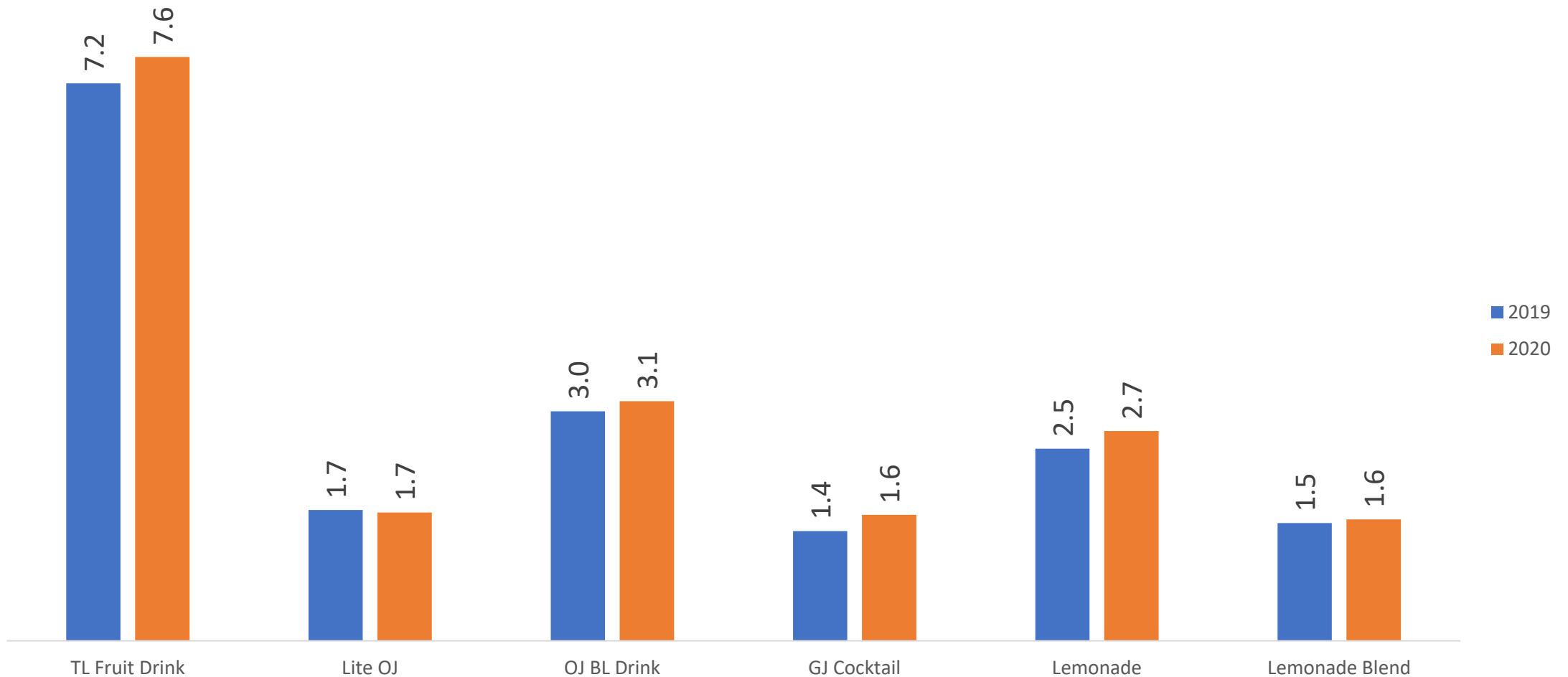
Source: Nielsen Homescan™ data for Y/E Dec 2020

Fruit Drink – Penetration



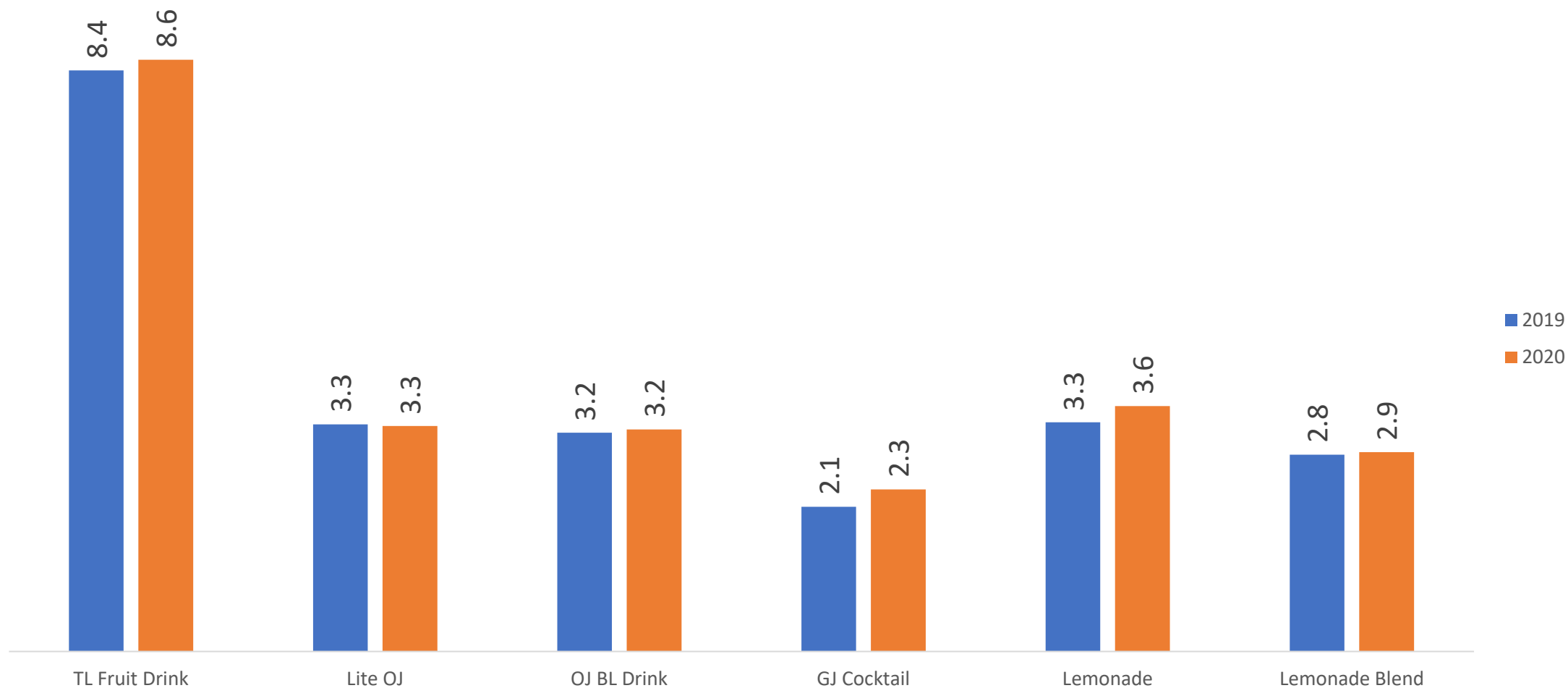
Source: Nielsen Homescan™ data for Y/E Dec 2020

Fruit Drink –Buying Rate



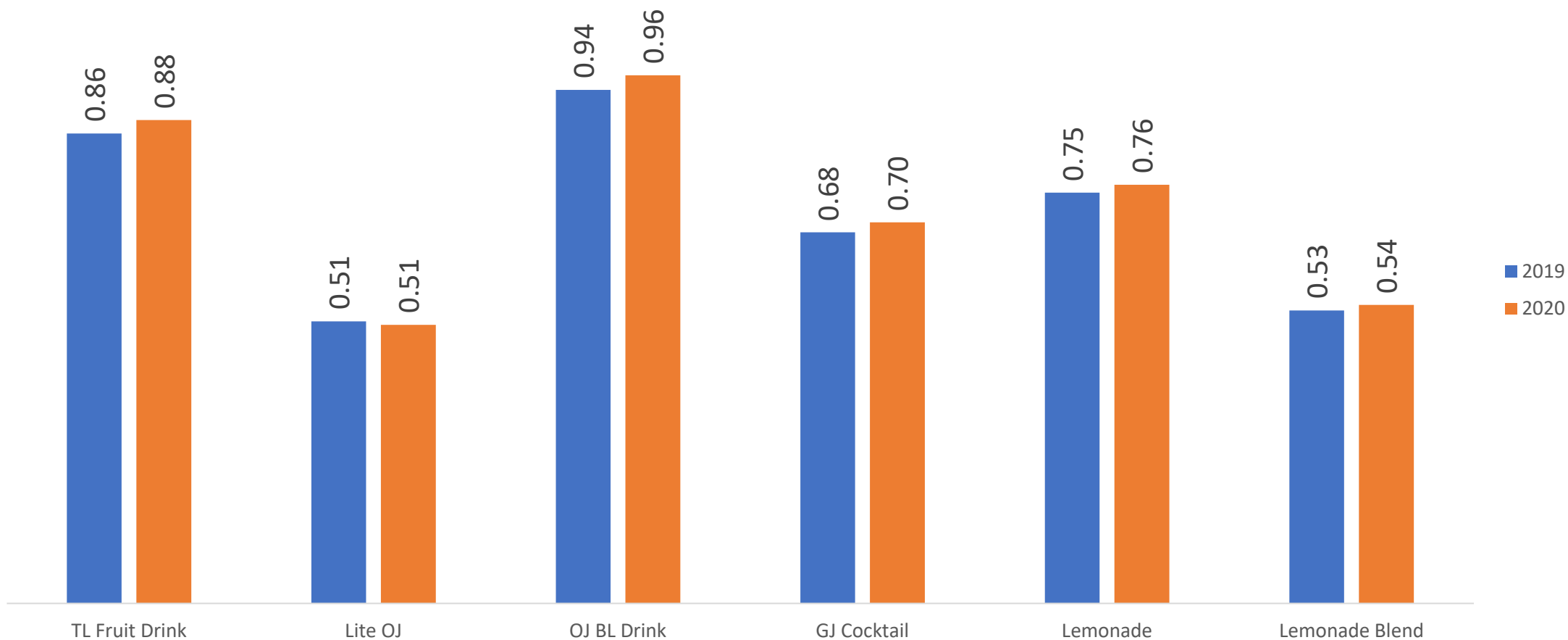
Source: Nielsen Homescan™ data for Y/E Dec 2020

Fruit Drink –Purchase Frequency



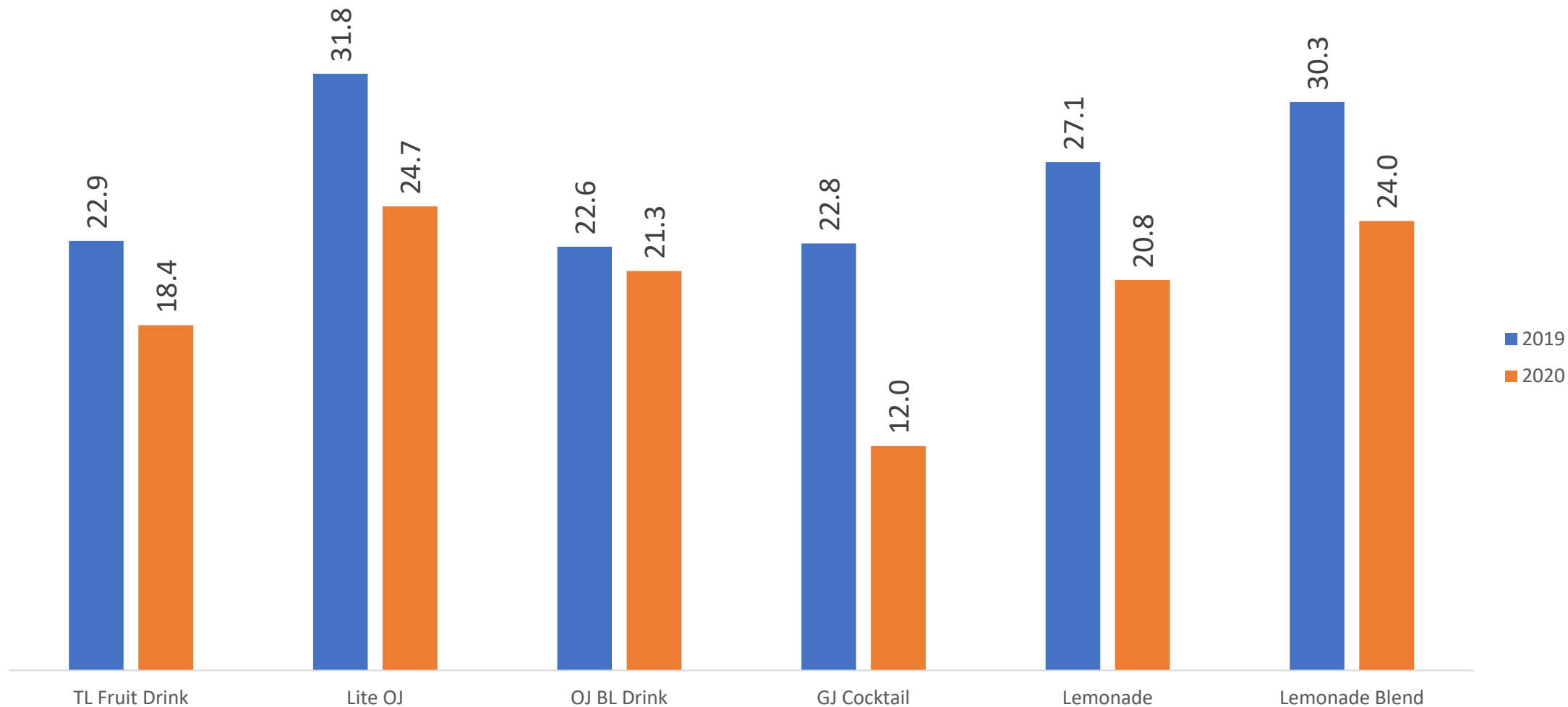
Source: Nielsen Homescan™ data for Y/E Dec 2020

Fruit Drink –Purchase Size



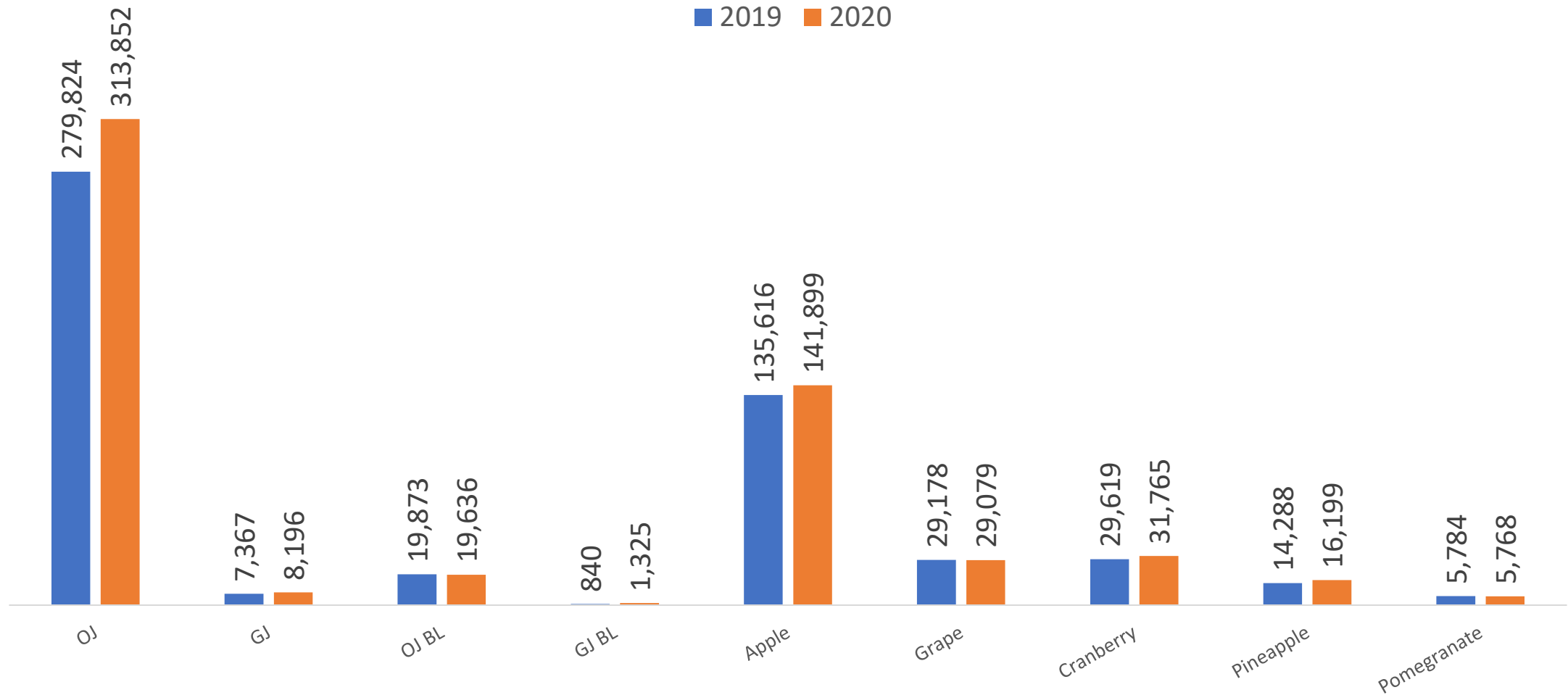
Source: Nielsen Homescan™ data for Y/E Dec 2020

Fruit Drink –% Purchased on Any Perceived Deal



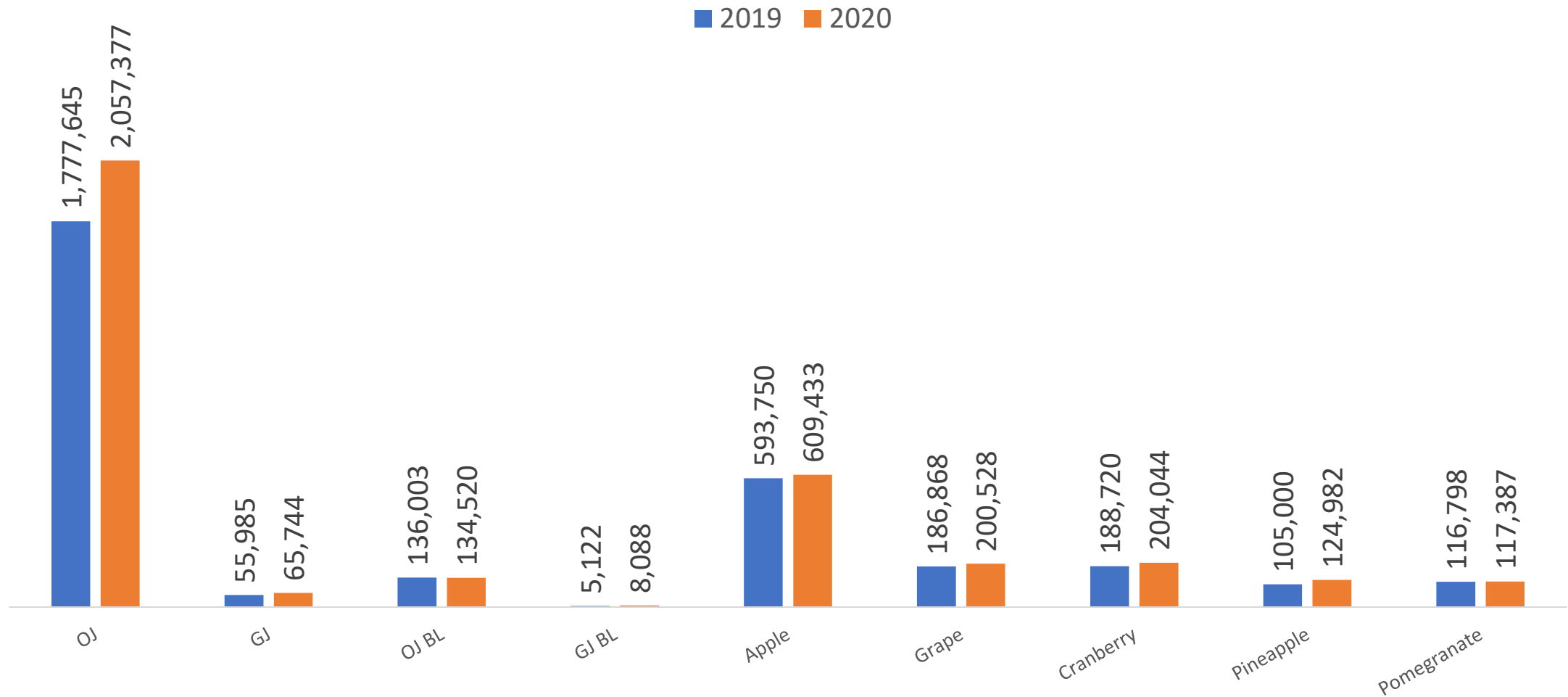
Source: Nielsen Homescan™ data for Y/E Dec 2020

100% Juice – Volume Sales (000)



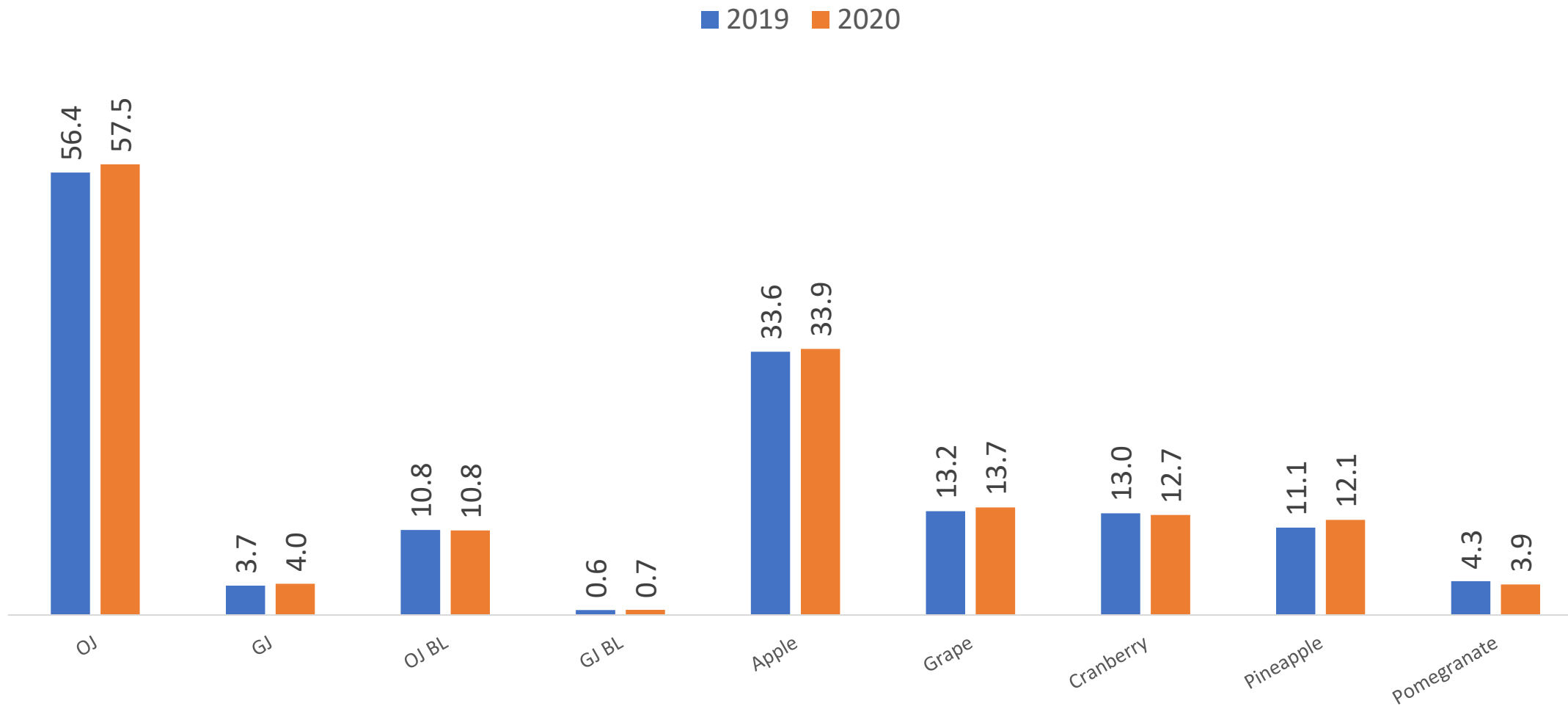
Source: Nielsen Homescan™ data for Y/E Dec 2020

100% Juice –Dollar Sales (000)



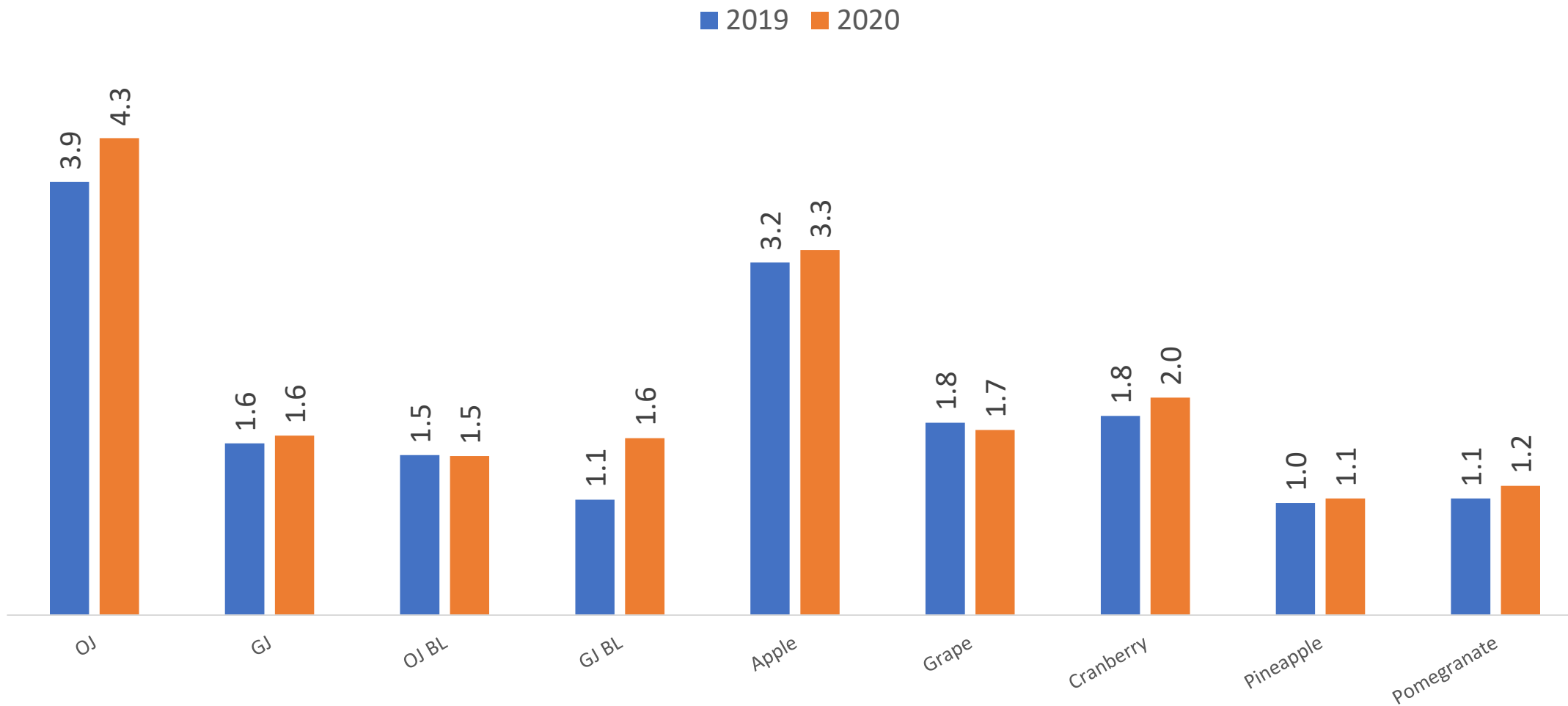
Source: Nielsen Homescan™ data for Y/E Dec 2020

100% Juice – Penetration



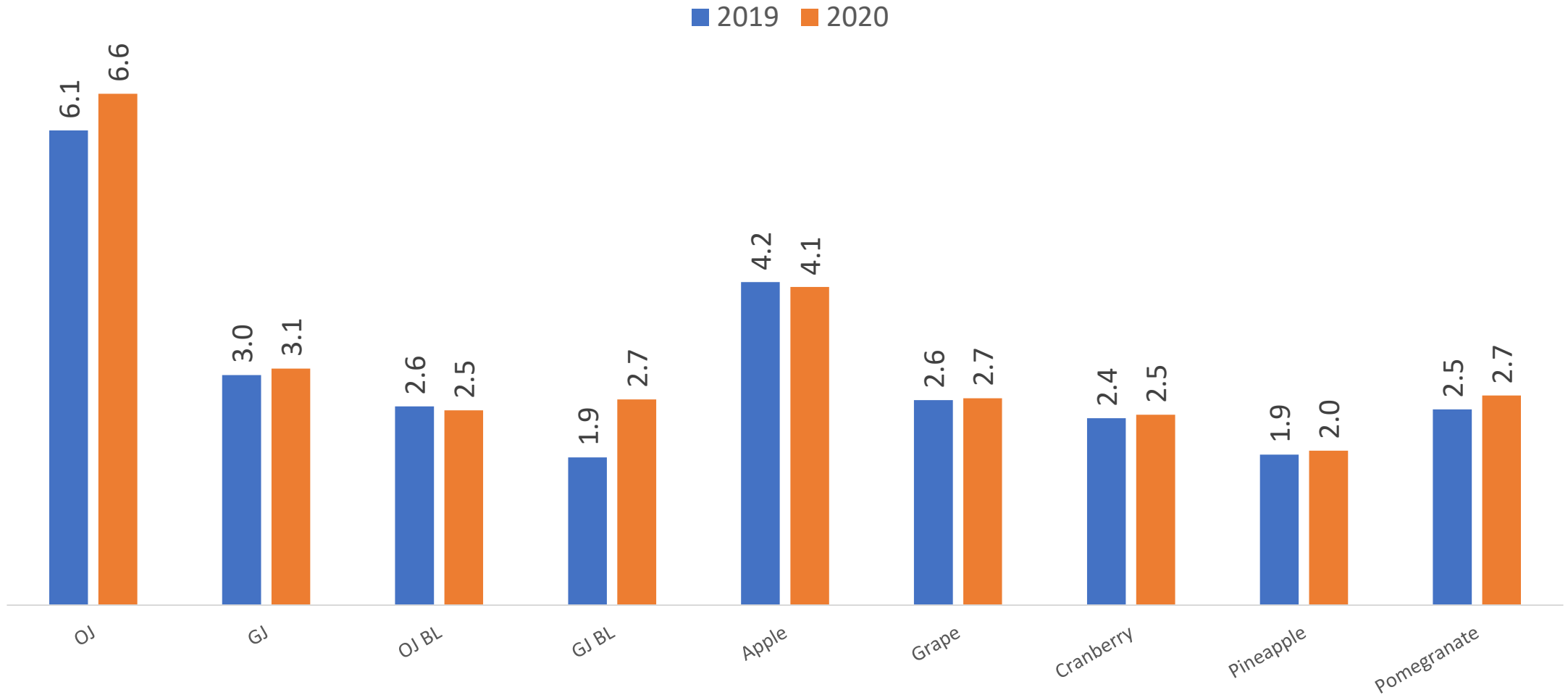
Source: Nielsen Homescan™ data for Y/E Dec 2020

100% Juice –Buying Rate



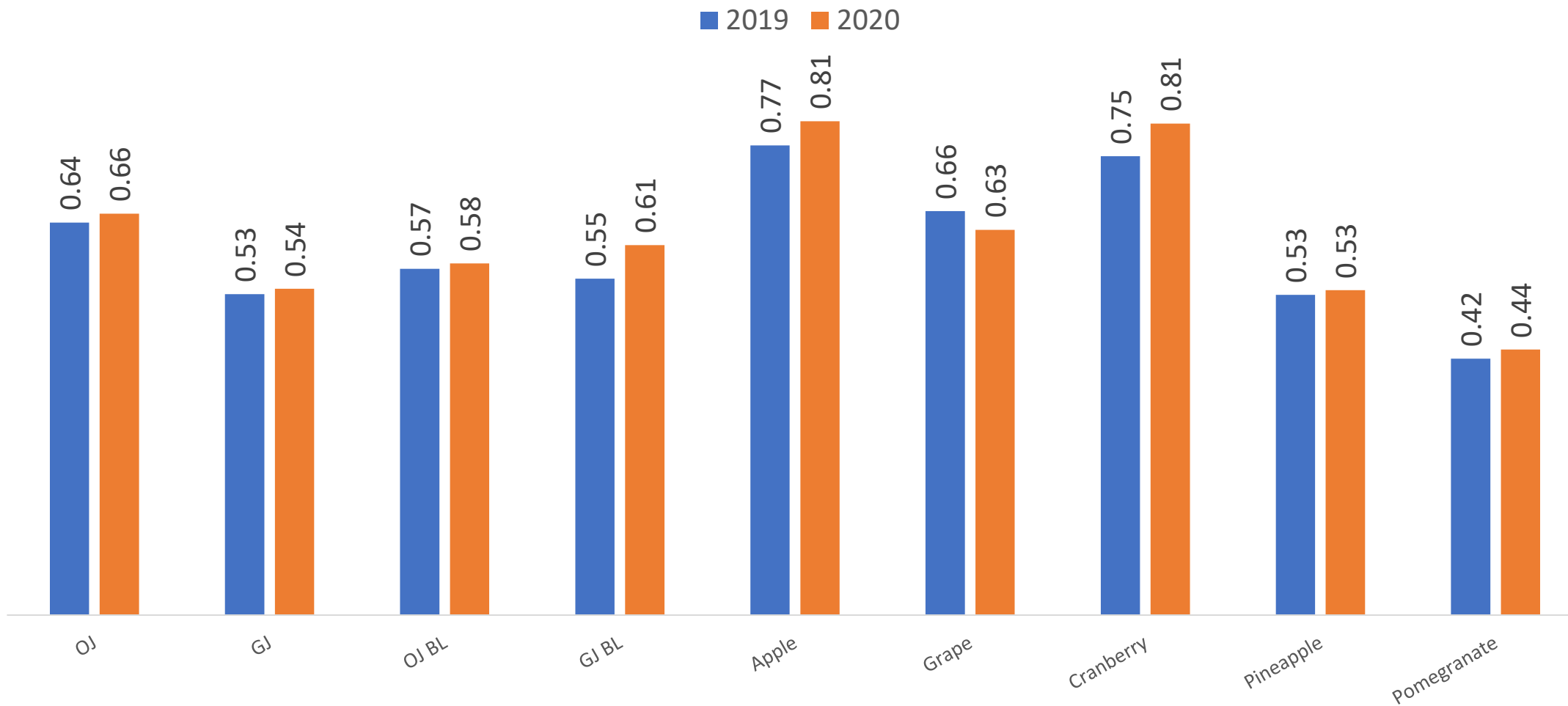
Source: Nielsen Homescan™ data for Y/E Dec 2020

100% Juice –Purchase Frequency



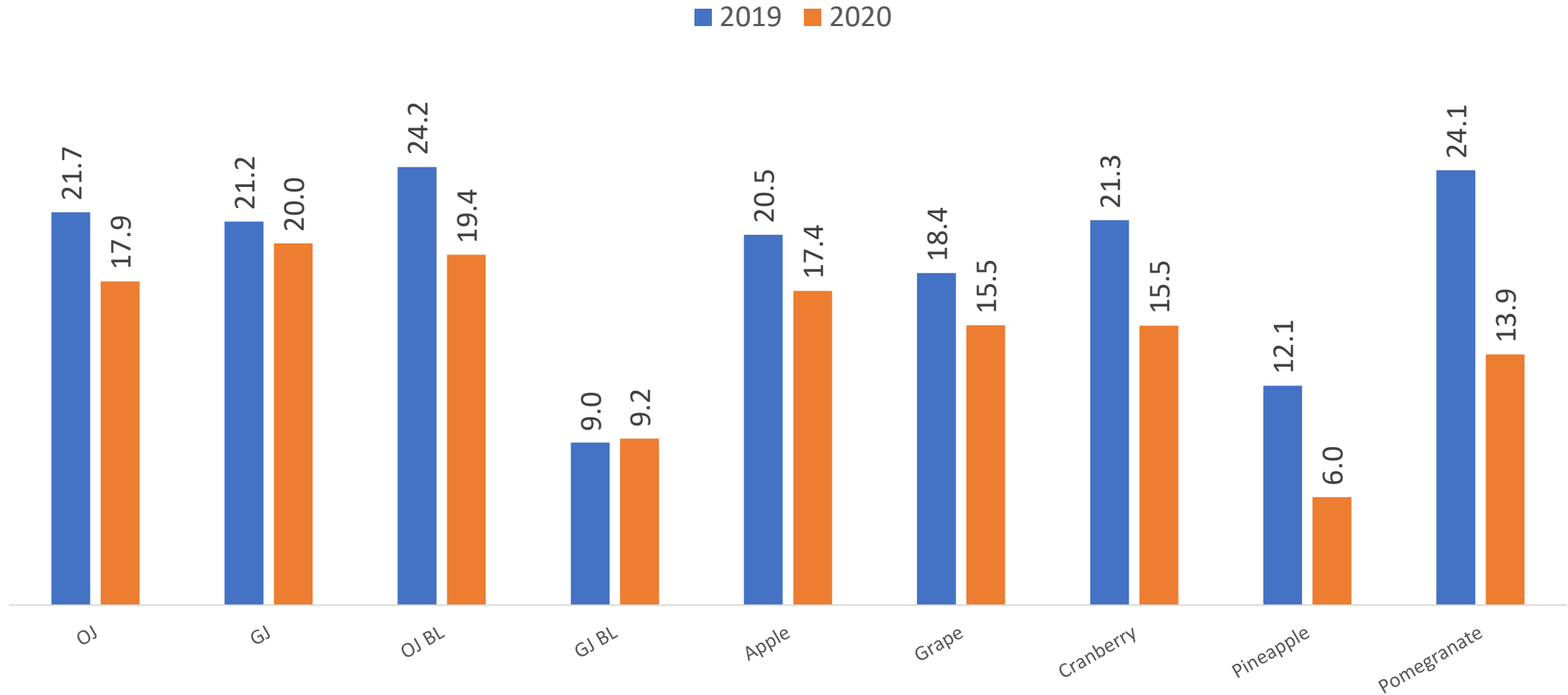
Source: Nielsen Homescan™ data for Y/E Dec 2020

100% Juice –Purchase Size



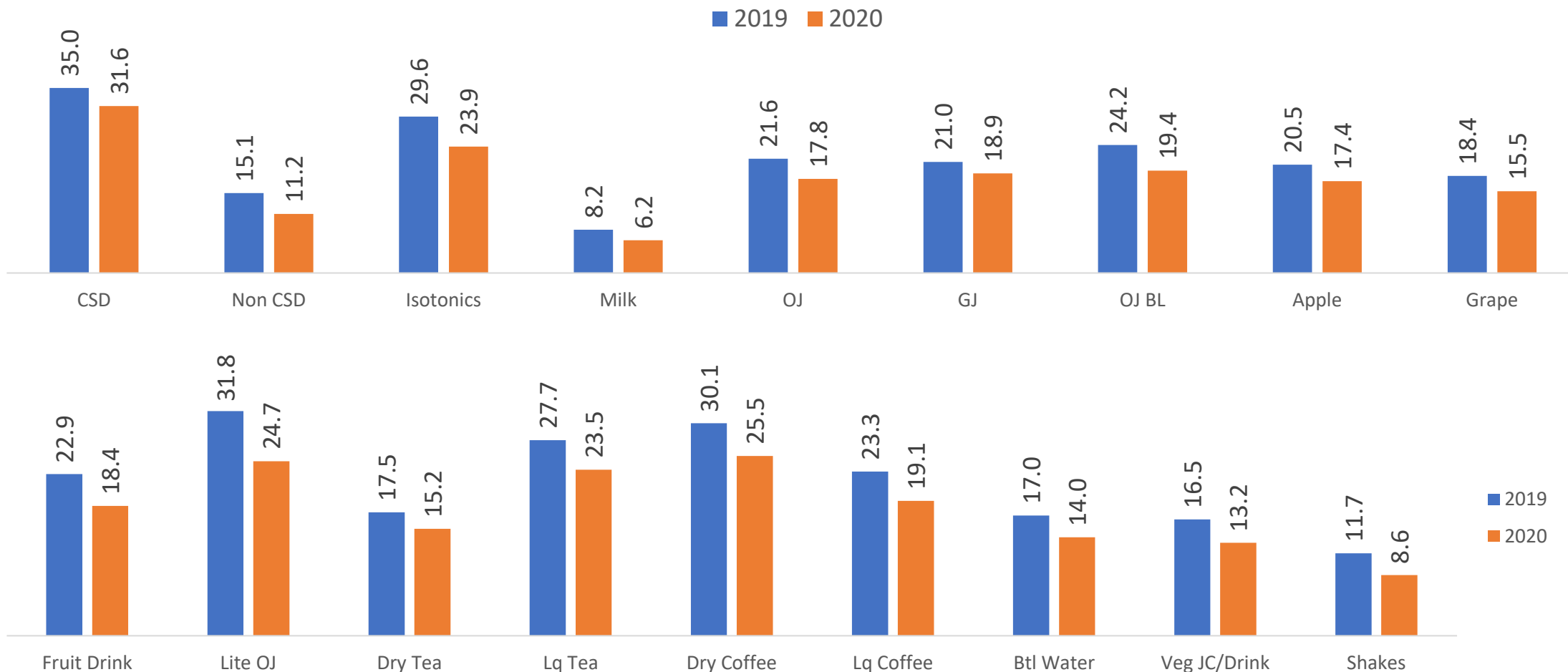
Source: Nielsen Homescan™ data for Y/E Dec 2020

100% Juice –% Purchased on Any Perceived Deal



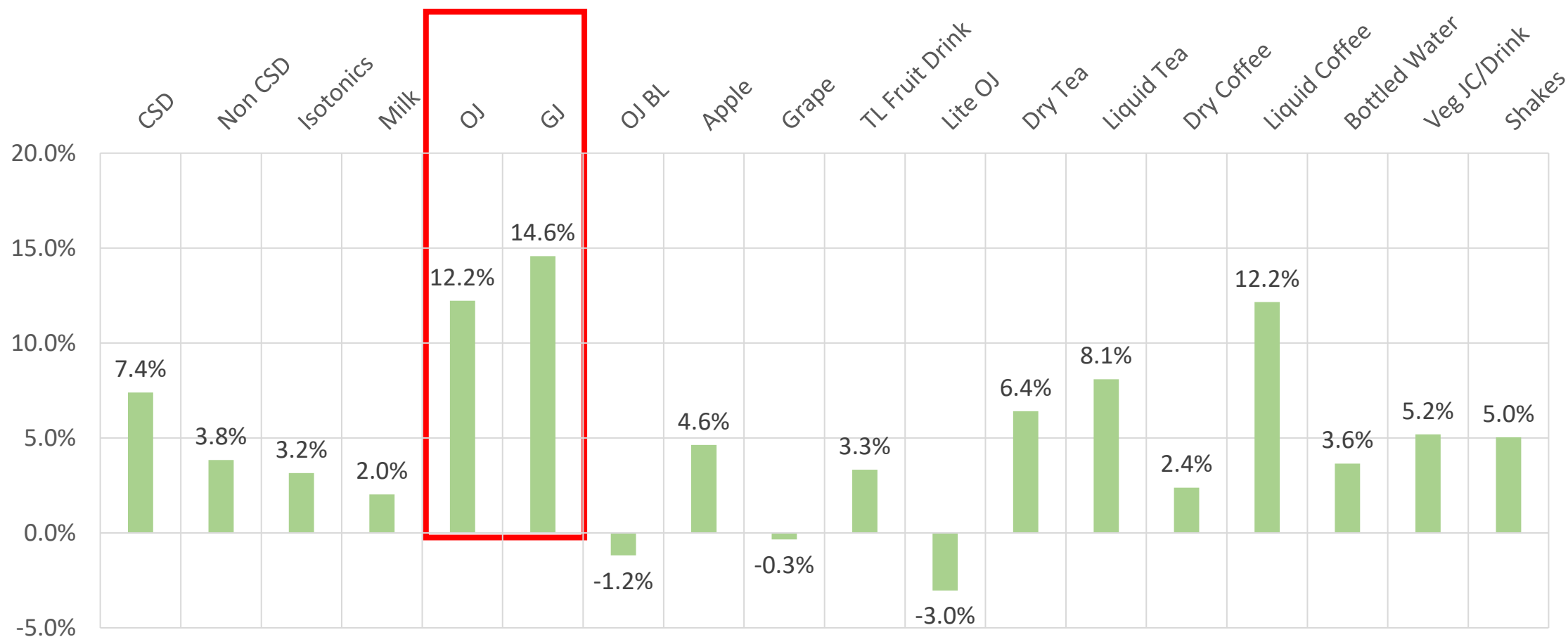
Source: Nielsen Homescan™ data for Y/E Dec 2020

Beverages –% Purchased on Any Perceived Deal



Source: Nielsen Homescan™ data for Y/E Dec 2020

Beverages – Volume Percent Change (2019 vs. 2020)



Source: Nielsen Homescan™ data for Y/E Dec 2020

Beverages – % Change in Household Penetration (2019 vs. 2020)



Source: Nielsen Homescan™ data for Y/E Dec 2020

A stylized illustration featuring two light gray hands. The hand on the top left is holding a solid orange circle. The hand on the bottom right is also holding a solid orange circle. The background is white, and the text 'Orange Juice Purchasing Review' is centered between the two hands.

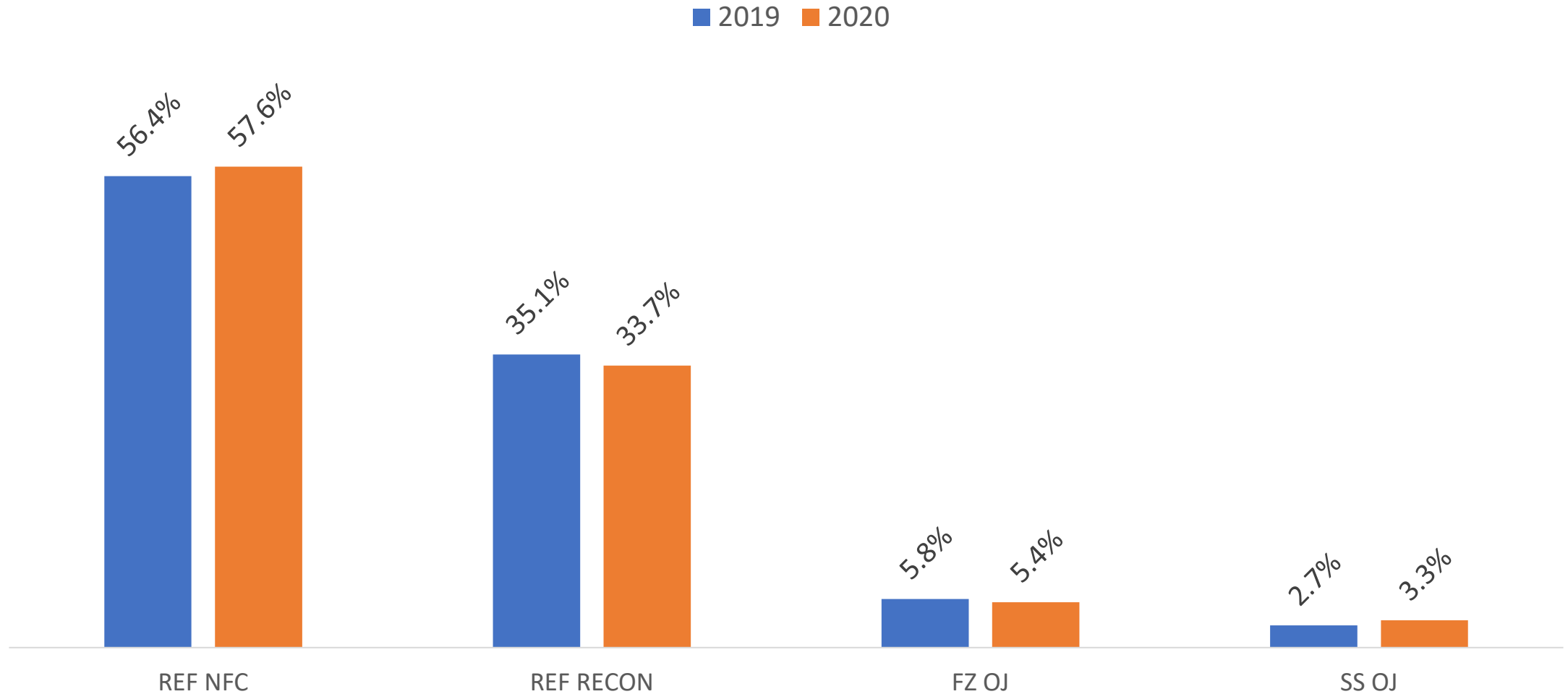
Orange Juice Purchasing Review

OJ HH Purchasing Trends

Year	Household Penetration	Buying Rate	Purchase Frequency	% Purchased on Perceived Deal
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
2019	54.8	3.9	6.1	22
2020	57.5	4.3	6.6	18

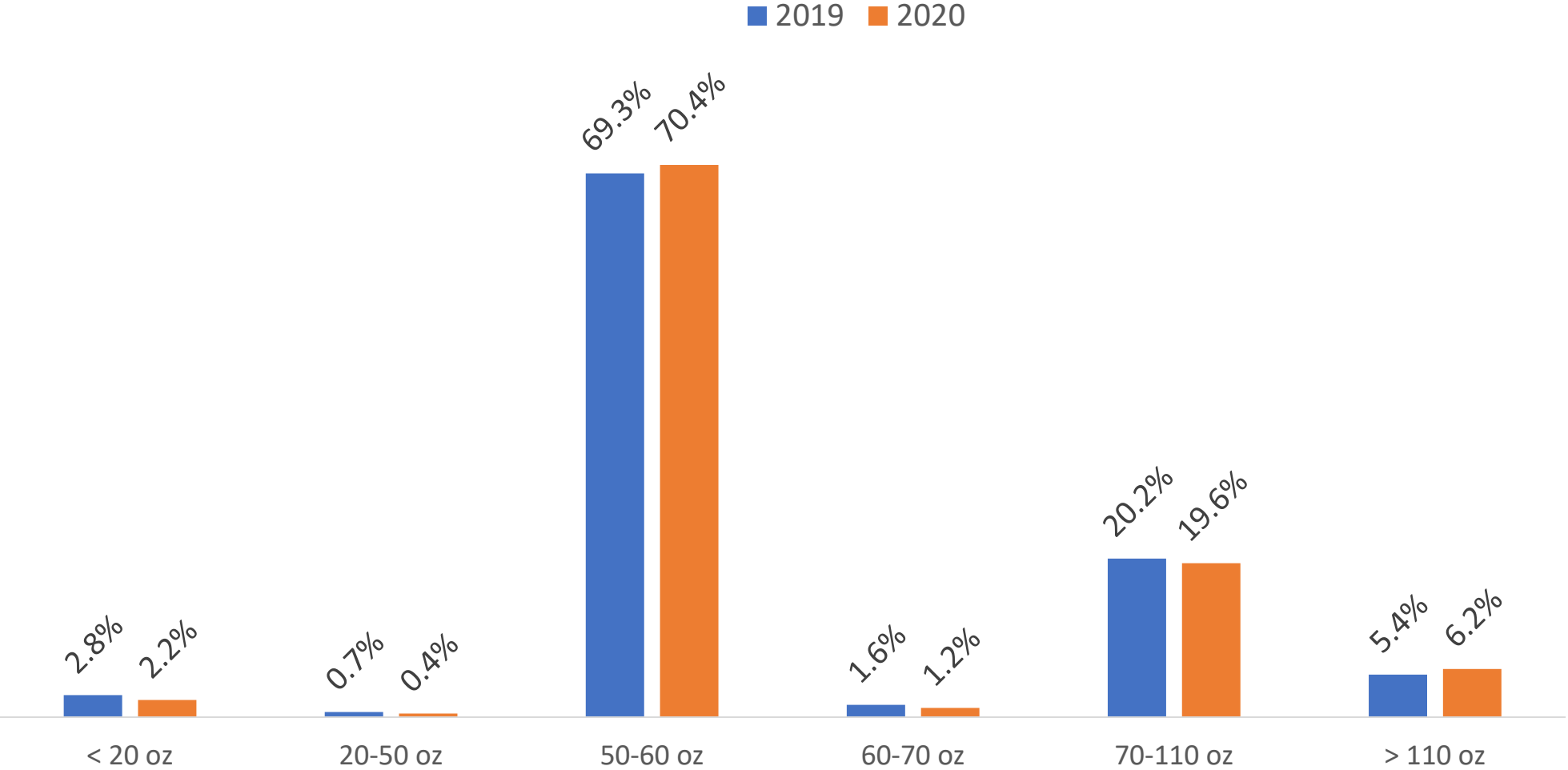
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice –% Share by Type



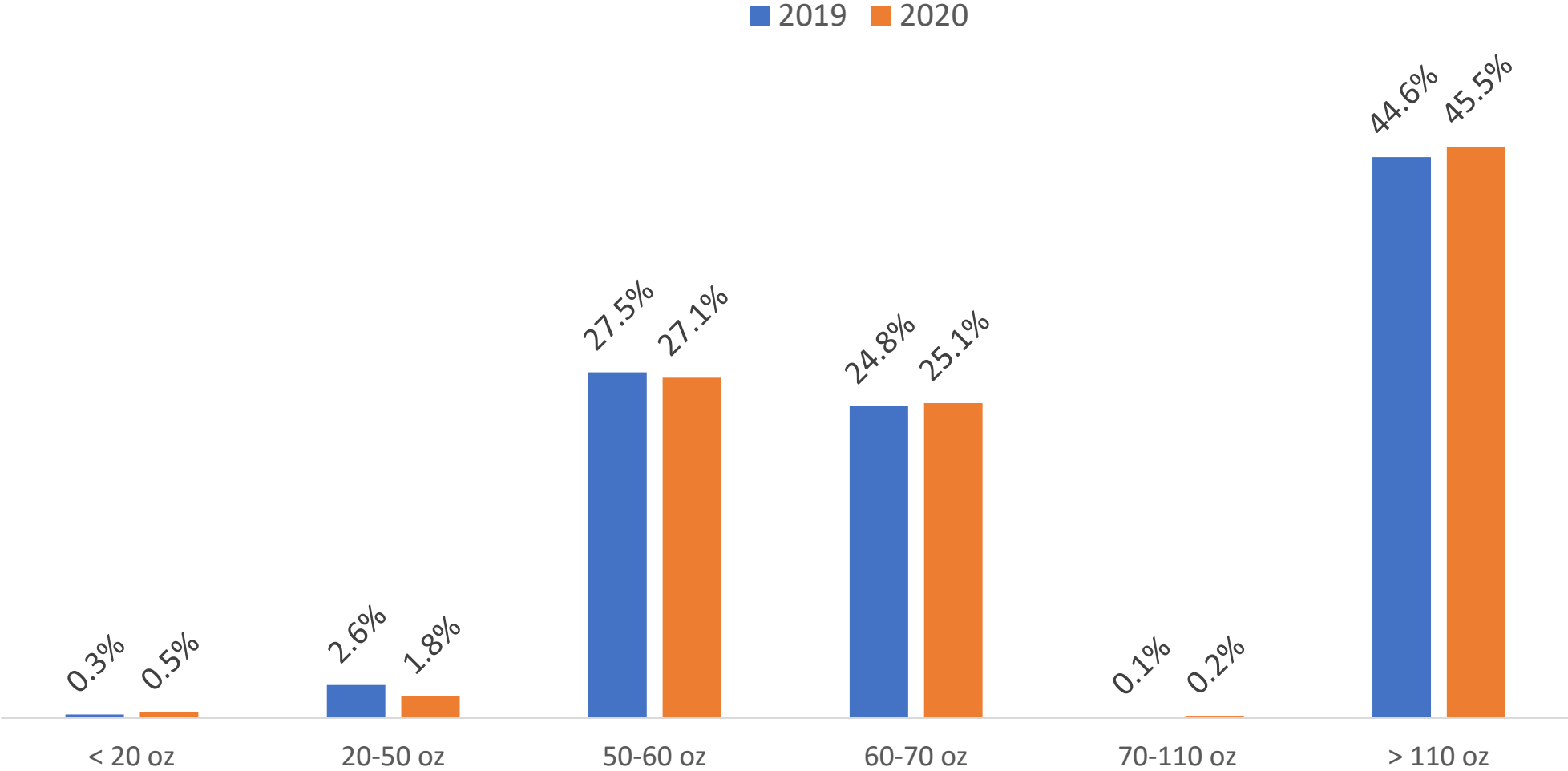
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice – REF NFC % Share by Size



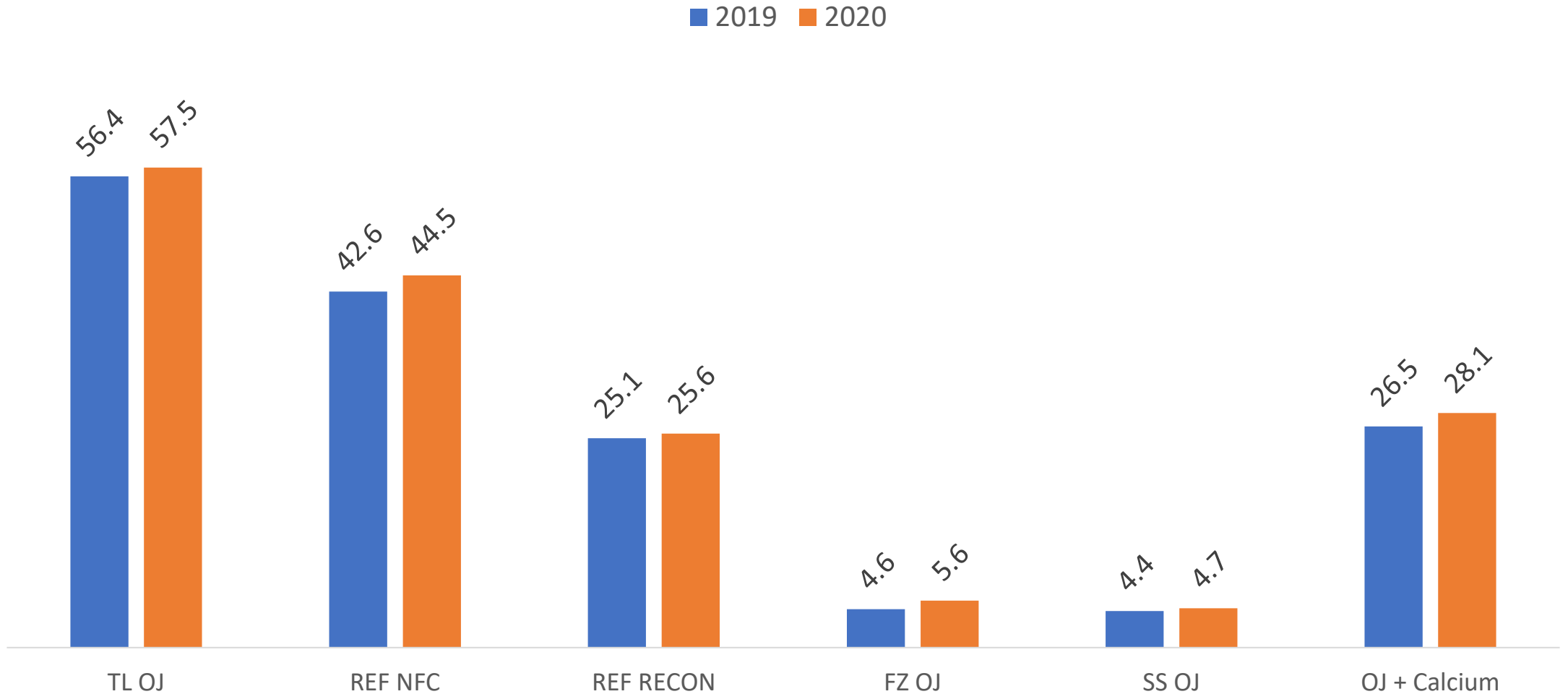
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice – REF RECON % Share by Size



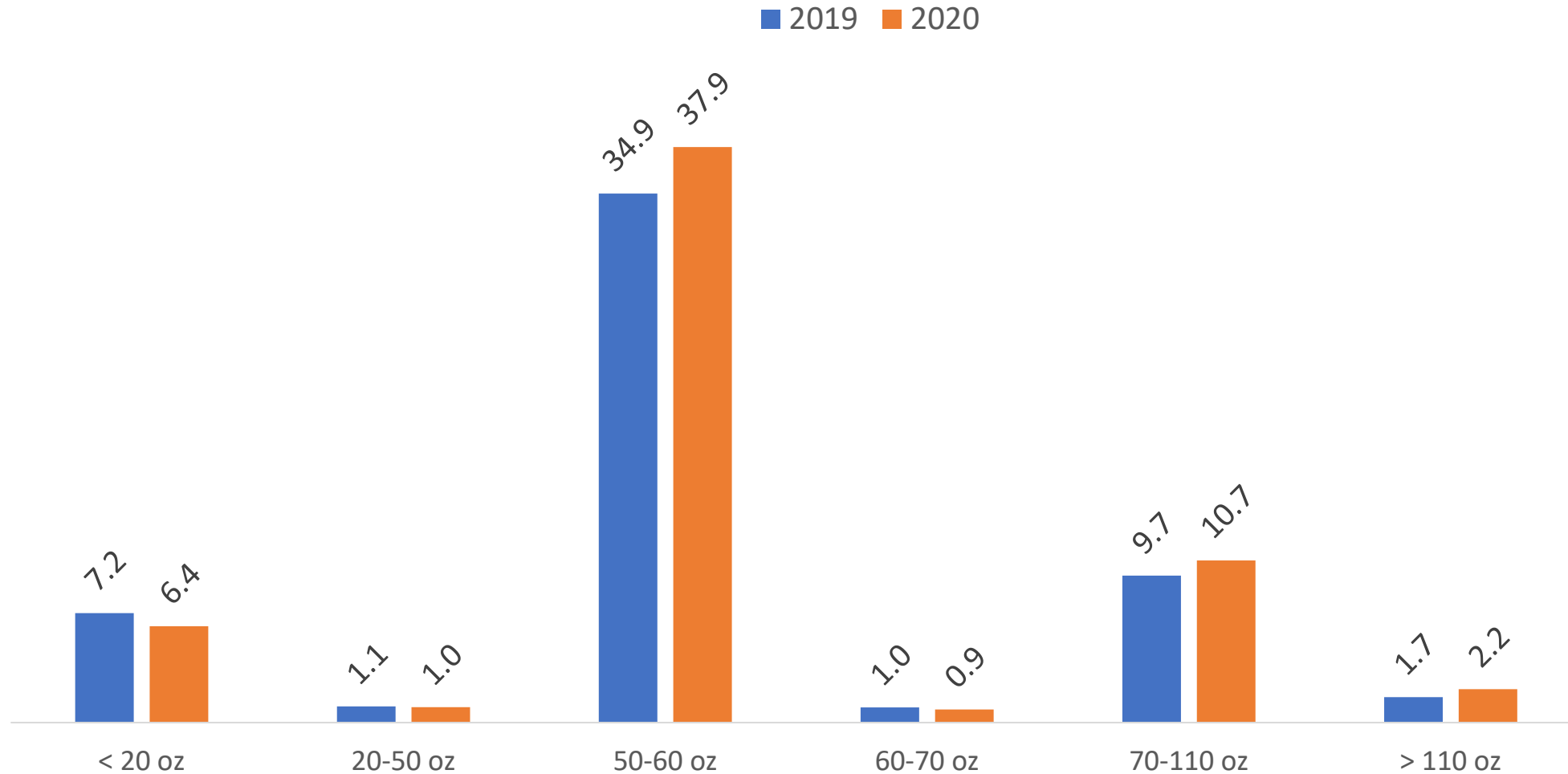
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice – Penetration



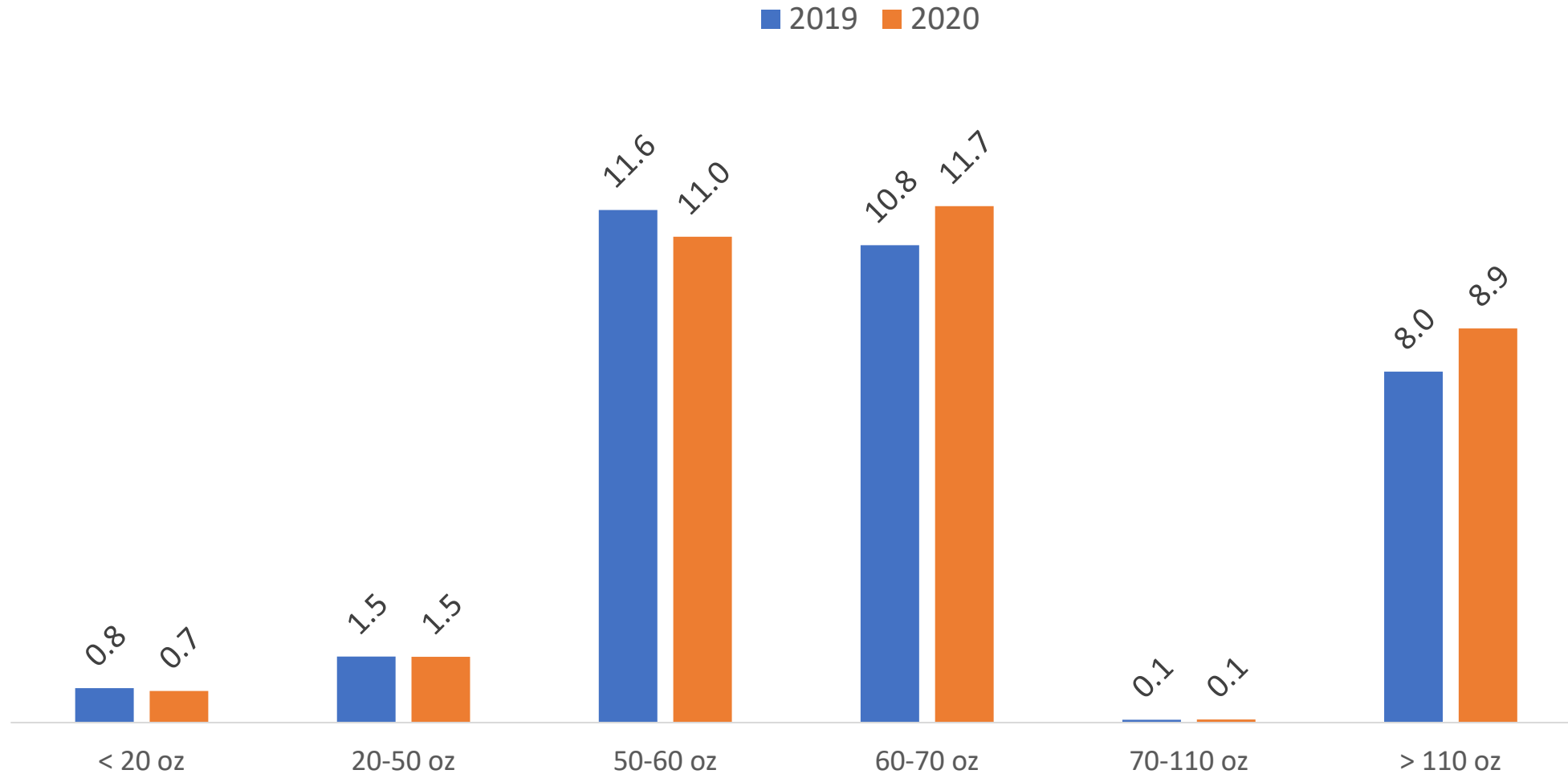
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice – REF NFC Penetration by Container Size



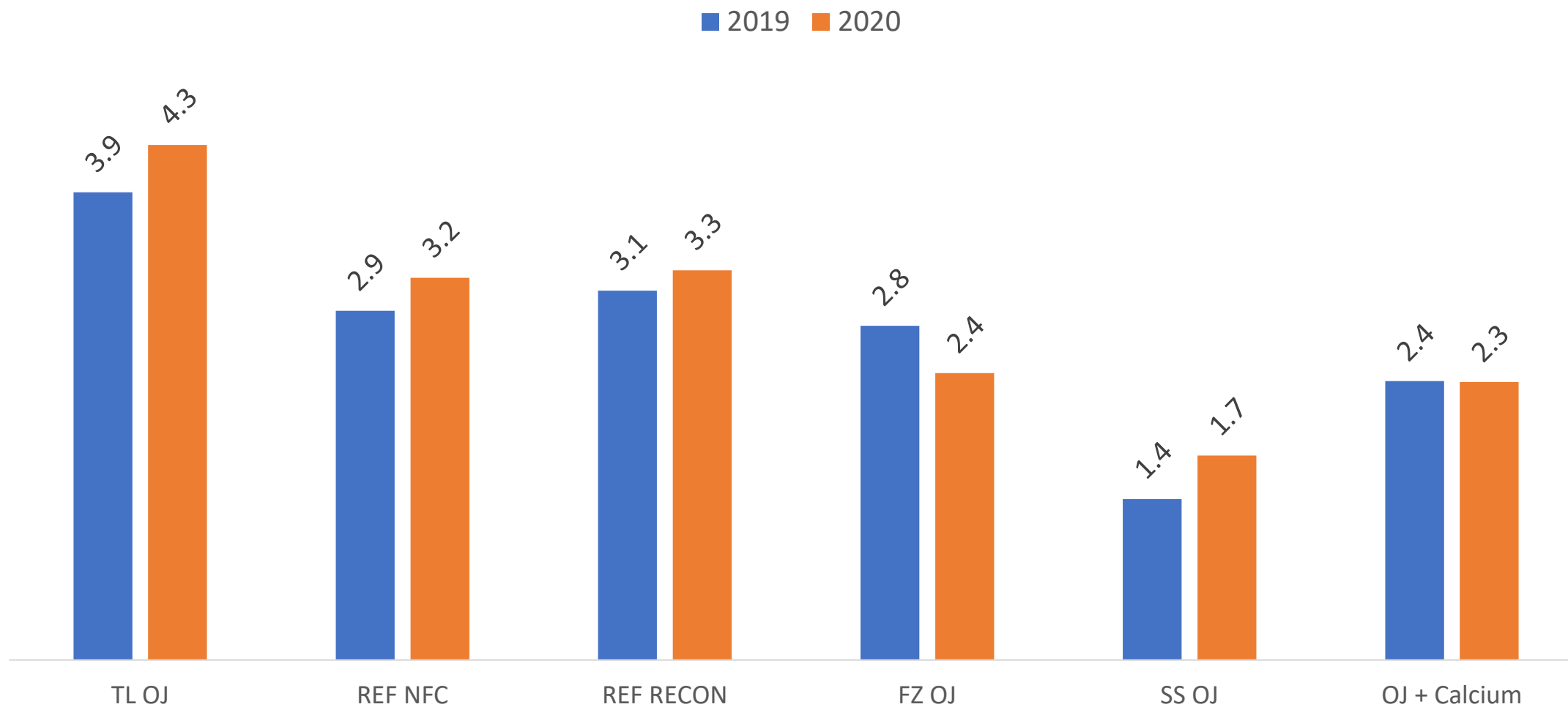
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice – REF RECON Penetration by Container Size



Source: Nielsen Homescan™ data for Y/E Dec 2020

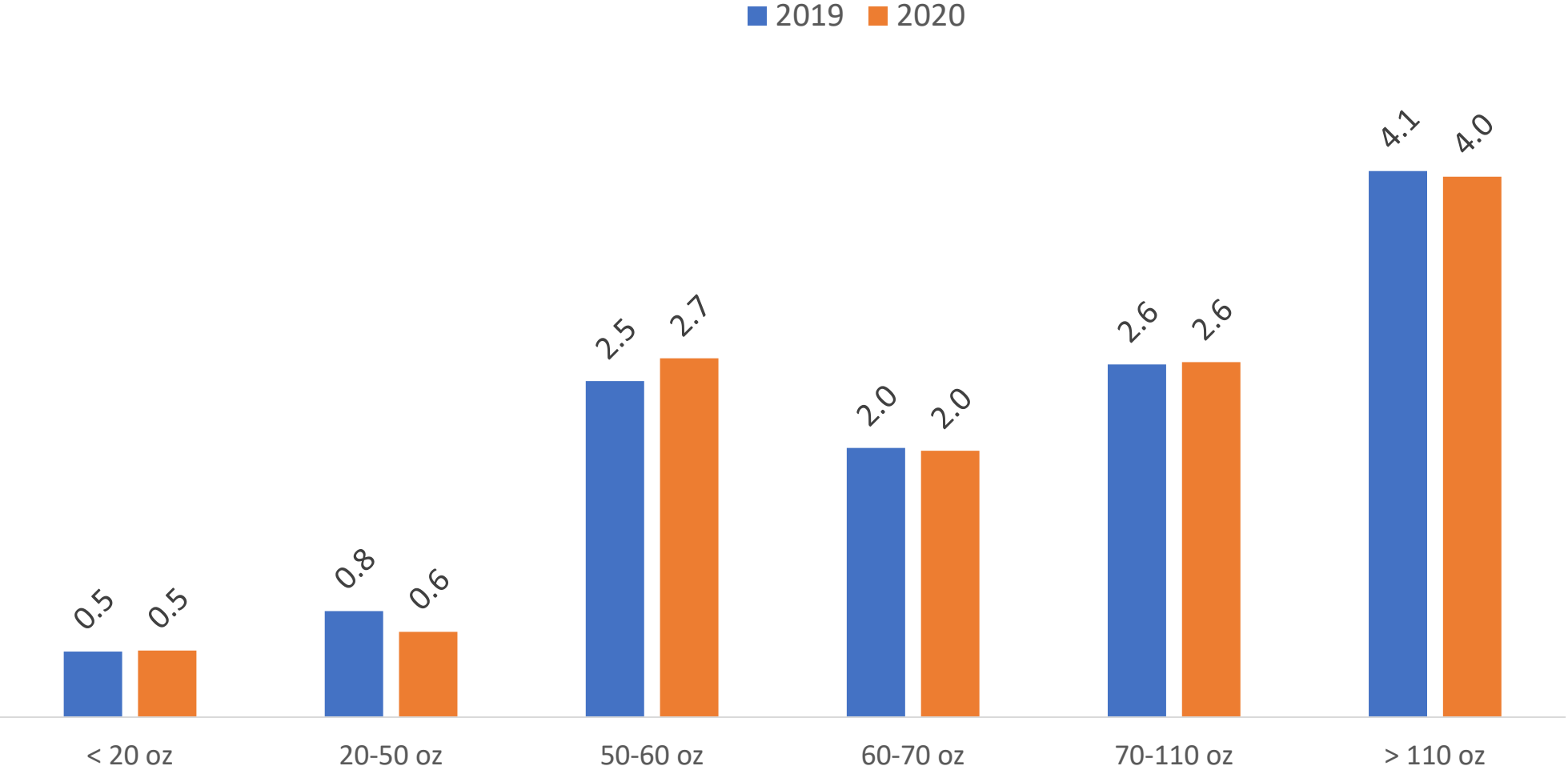
Orange Juice –Buying Rate



Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice – REF NFC

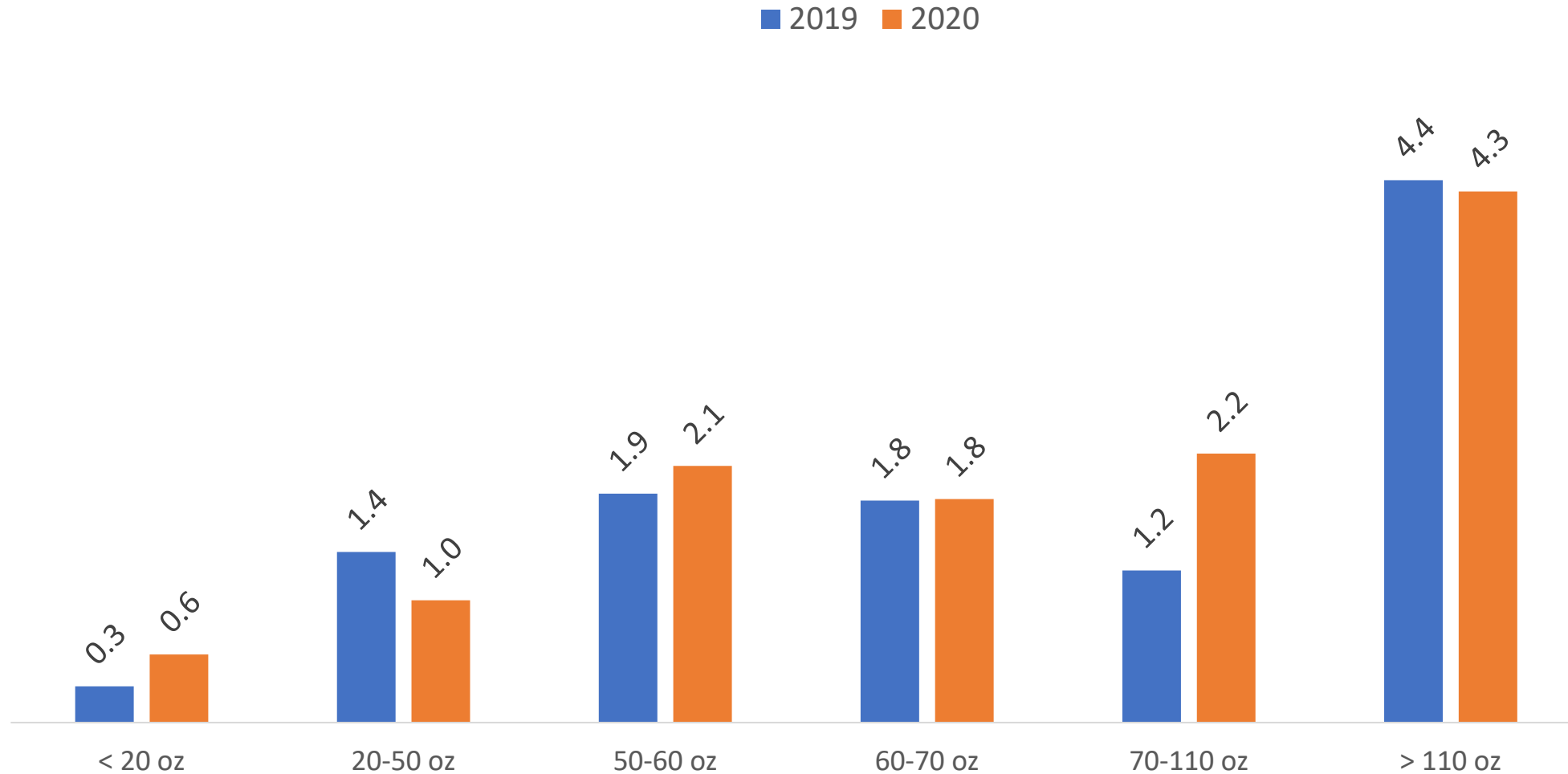
Buying Rate by Size



Source: Nielsen Homescan™ data for Y/E Dec 2020

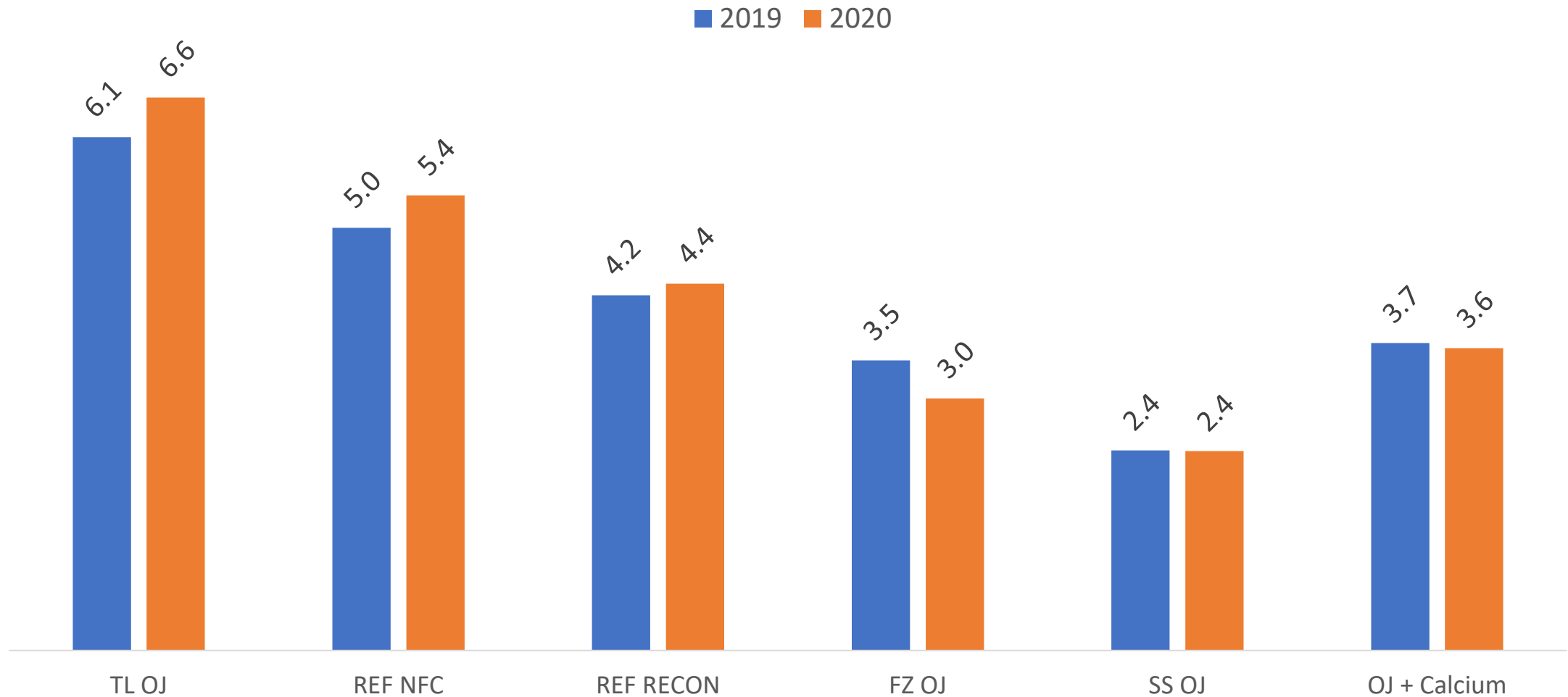
Orange Juice – REF RECON

Buying Rate by Size



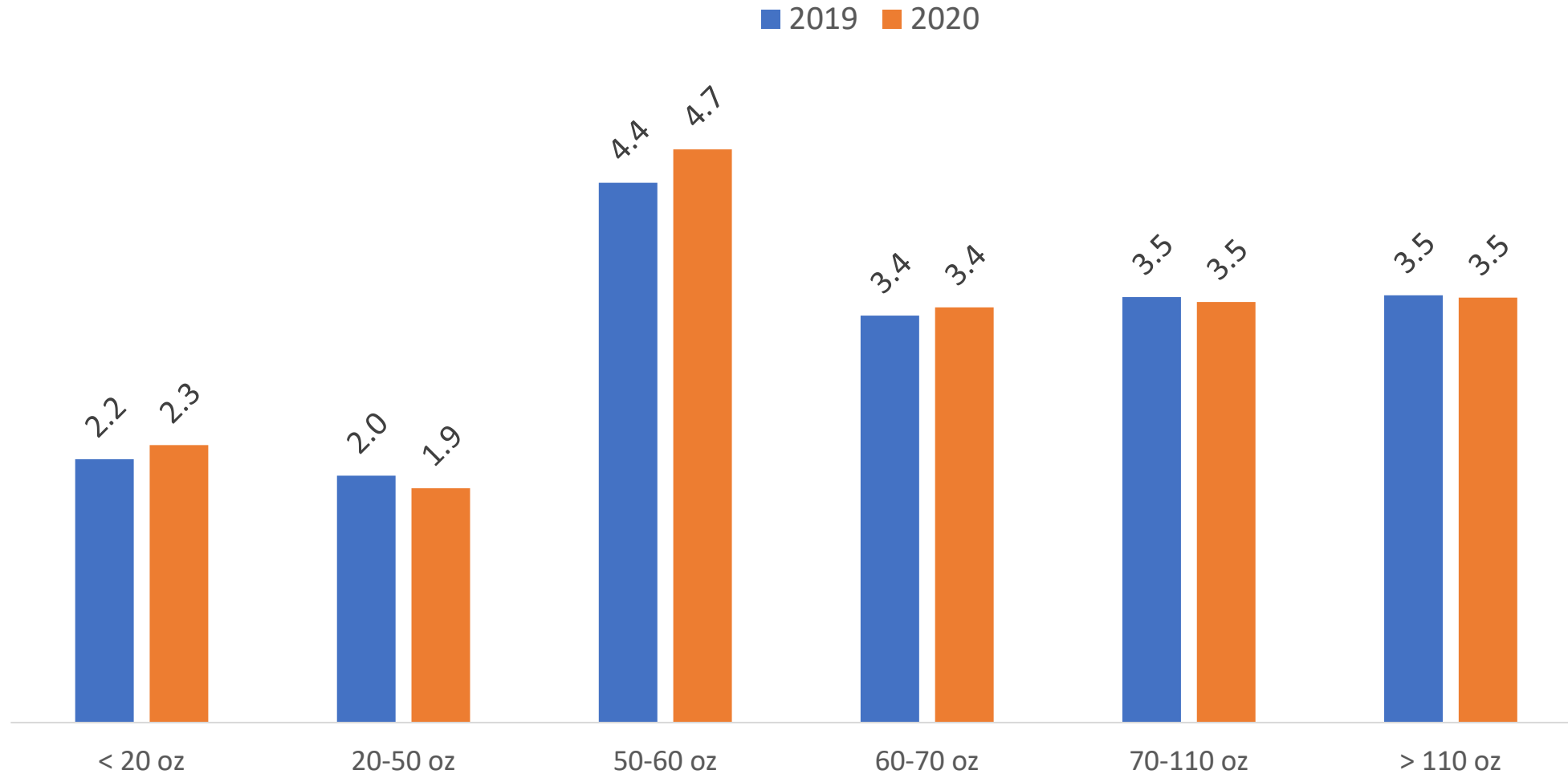
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice –Purchase Frequency



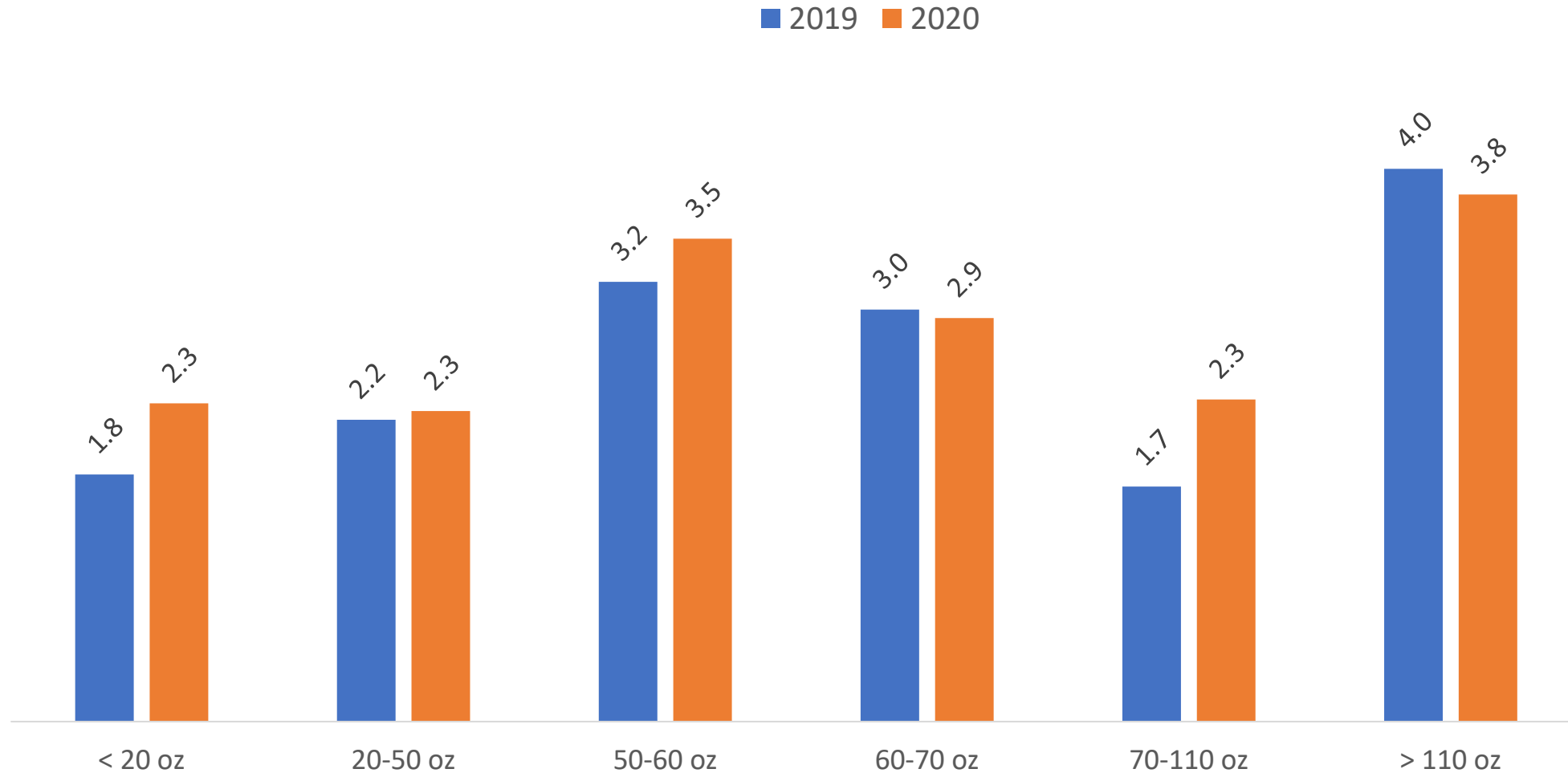
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice – REF NFC Purchase Frequency by Size



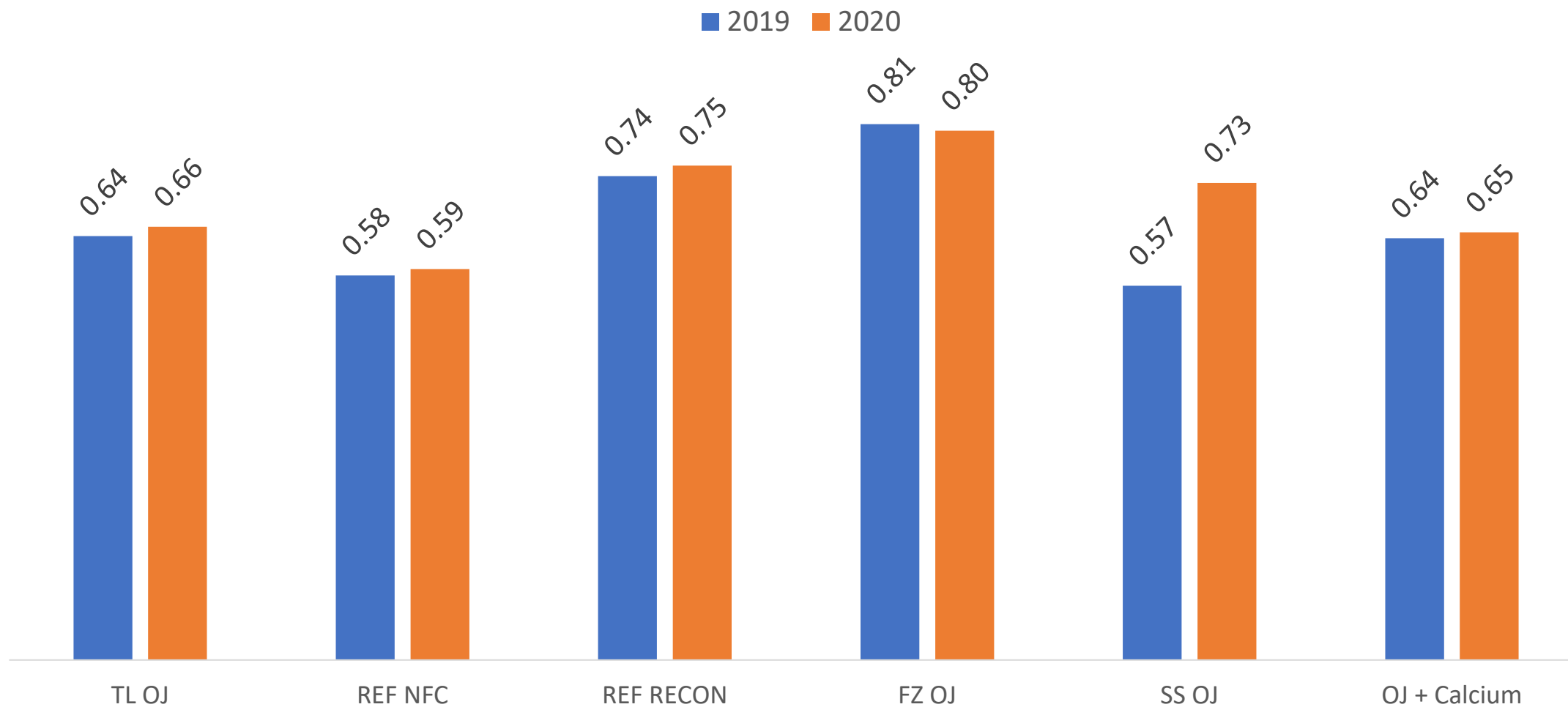
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice – REF RECON Purchase Frequency by Size



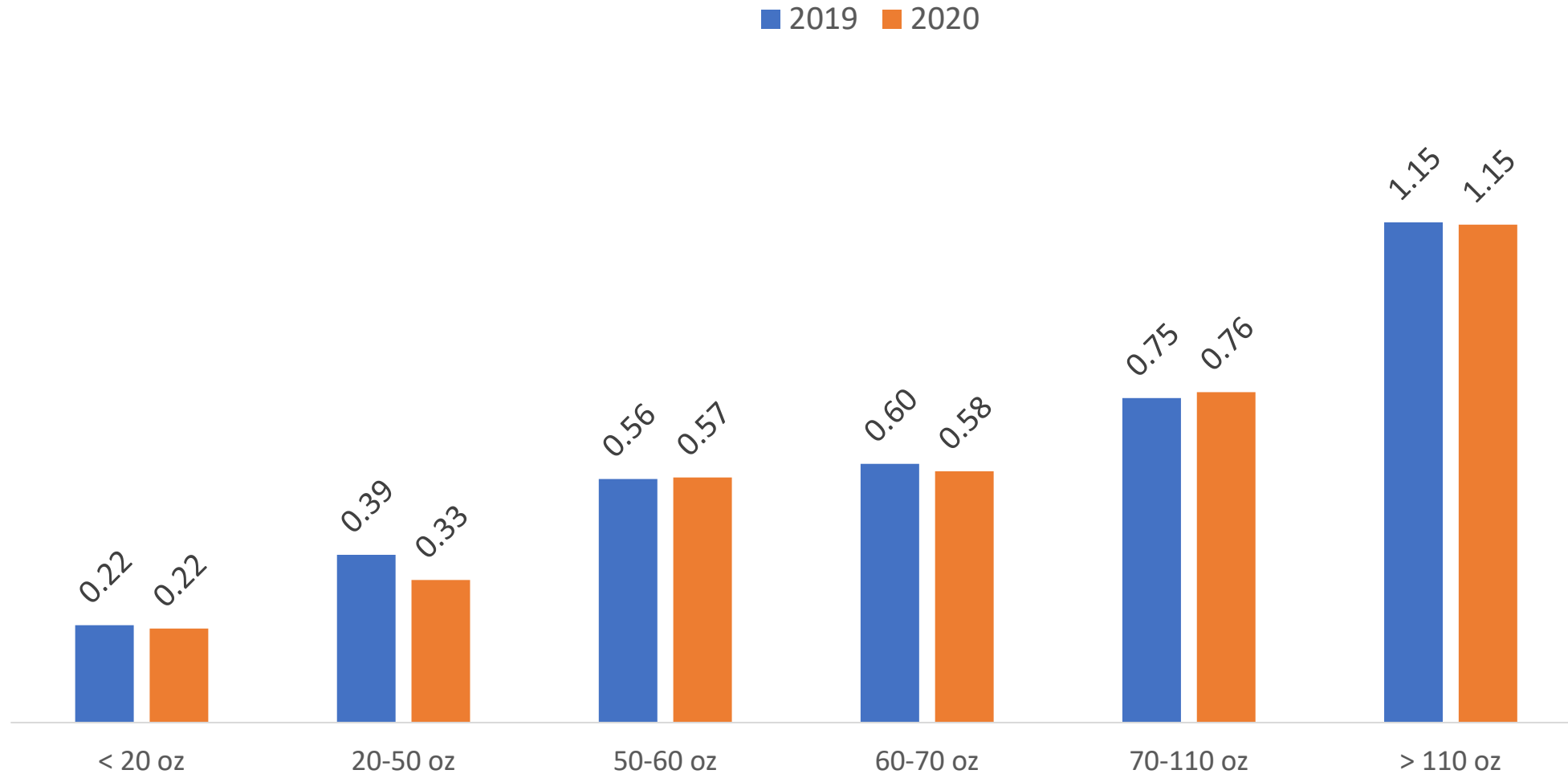
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice –Purchase Size



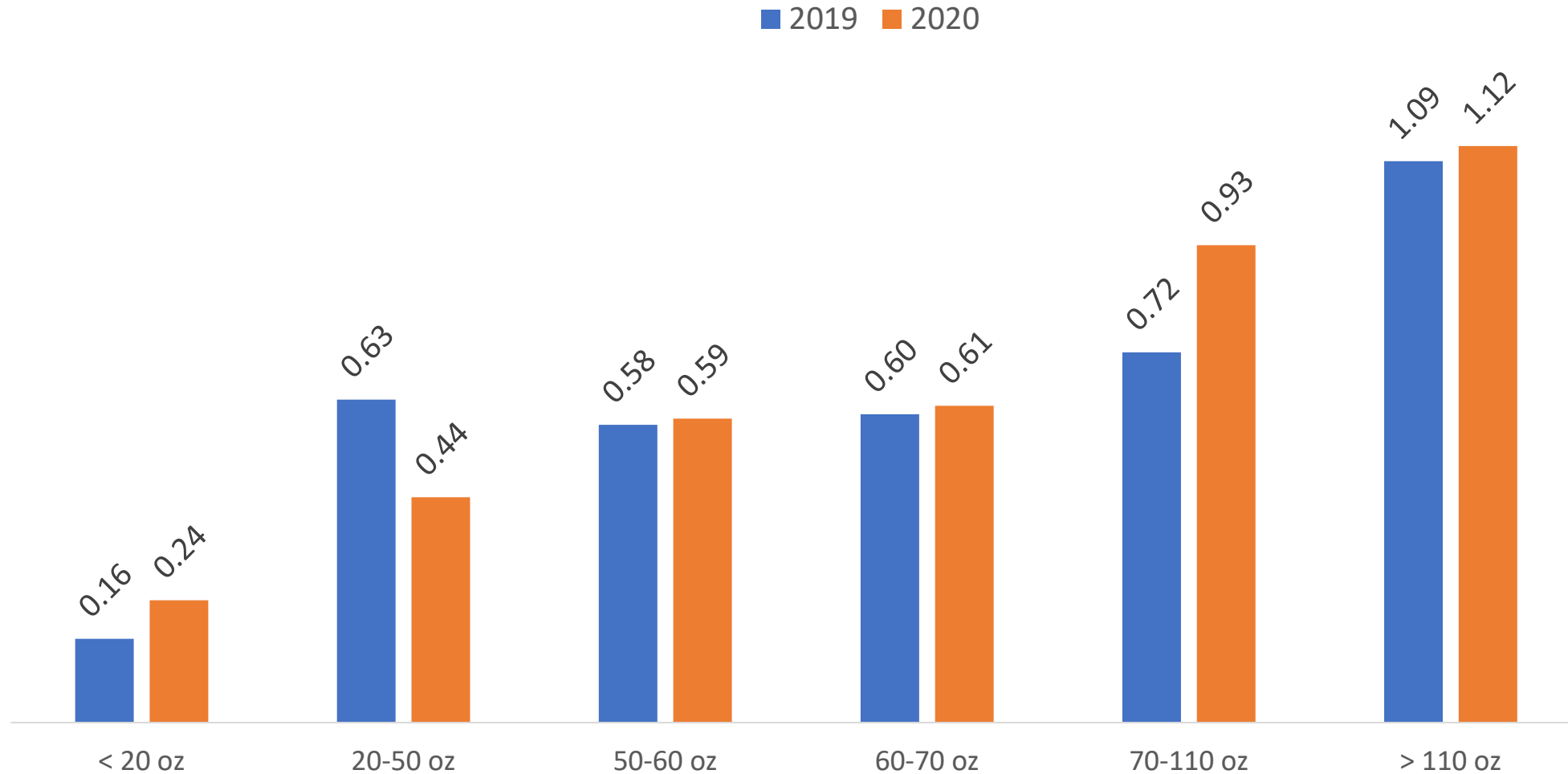
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice – REF NFC Purchase Size by Container Size



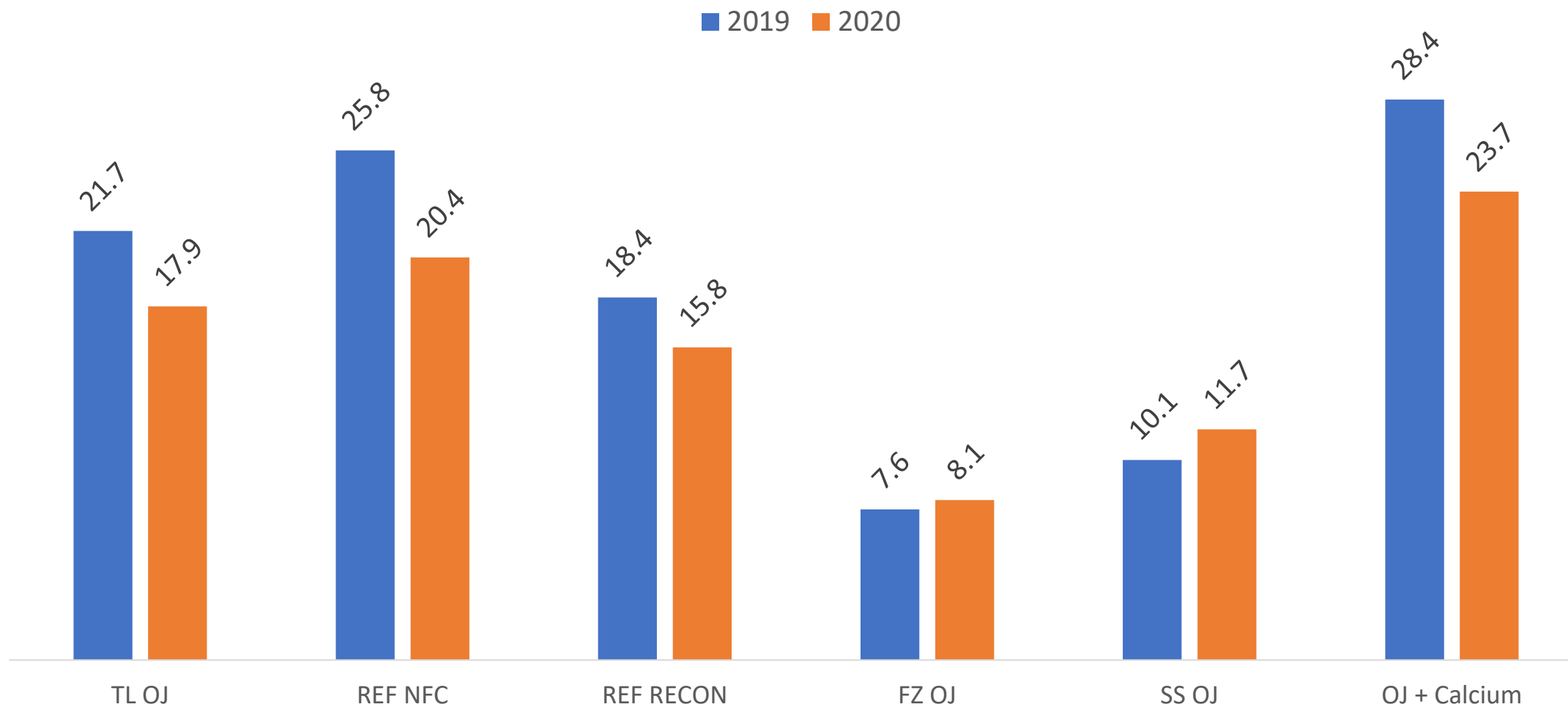
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice – REF RECON Purchase Size by Container Size



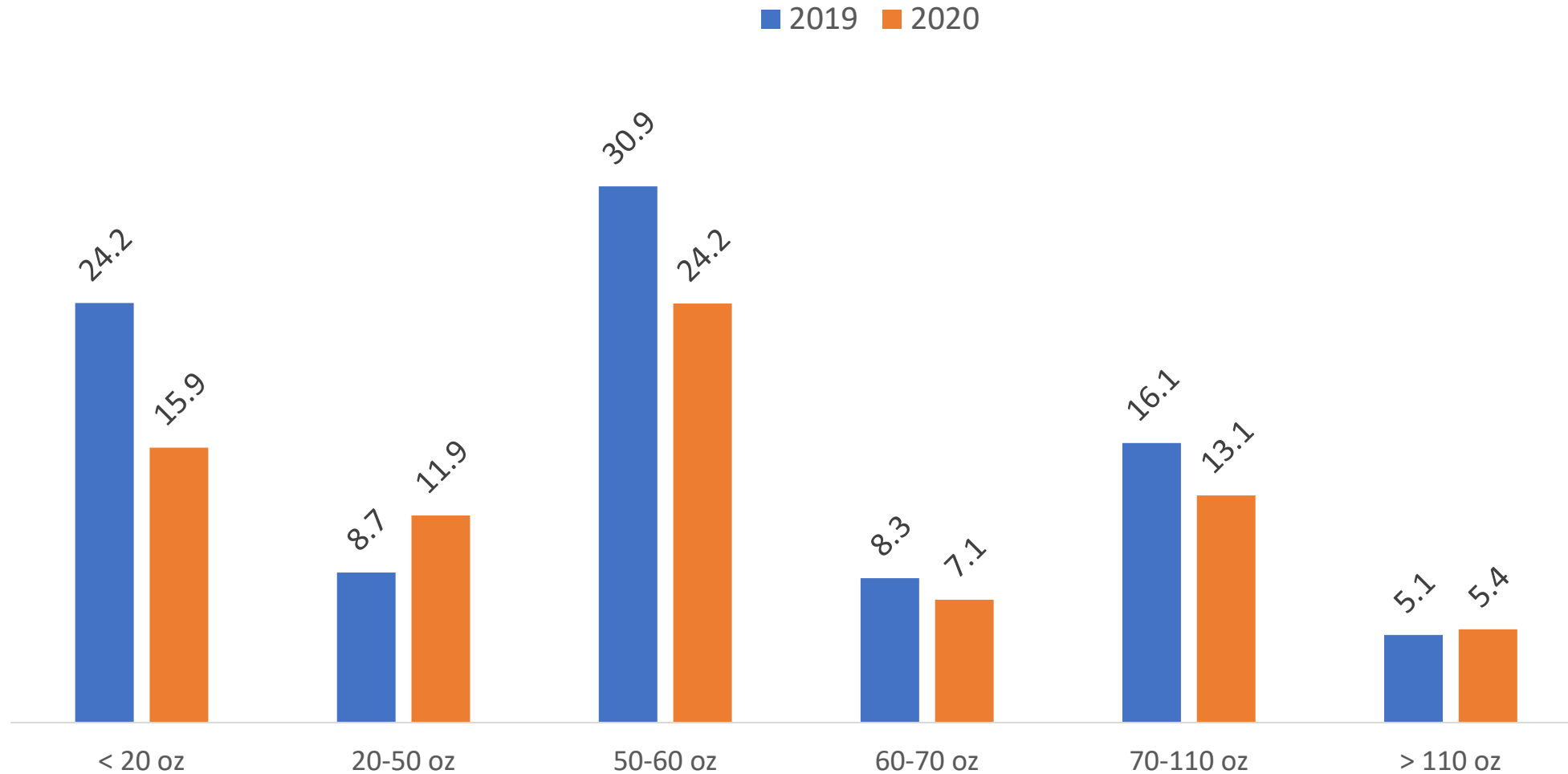
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice –% Purchased on Any Perceived Deal



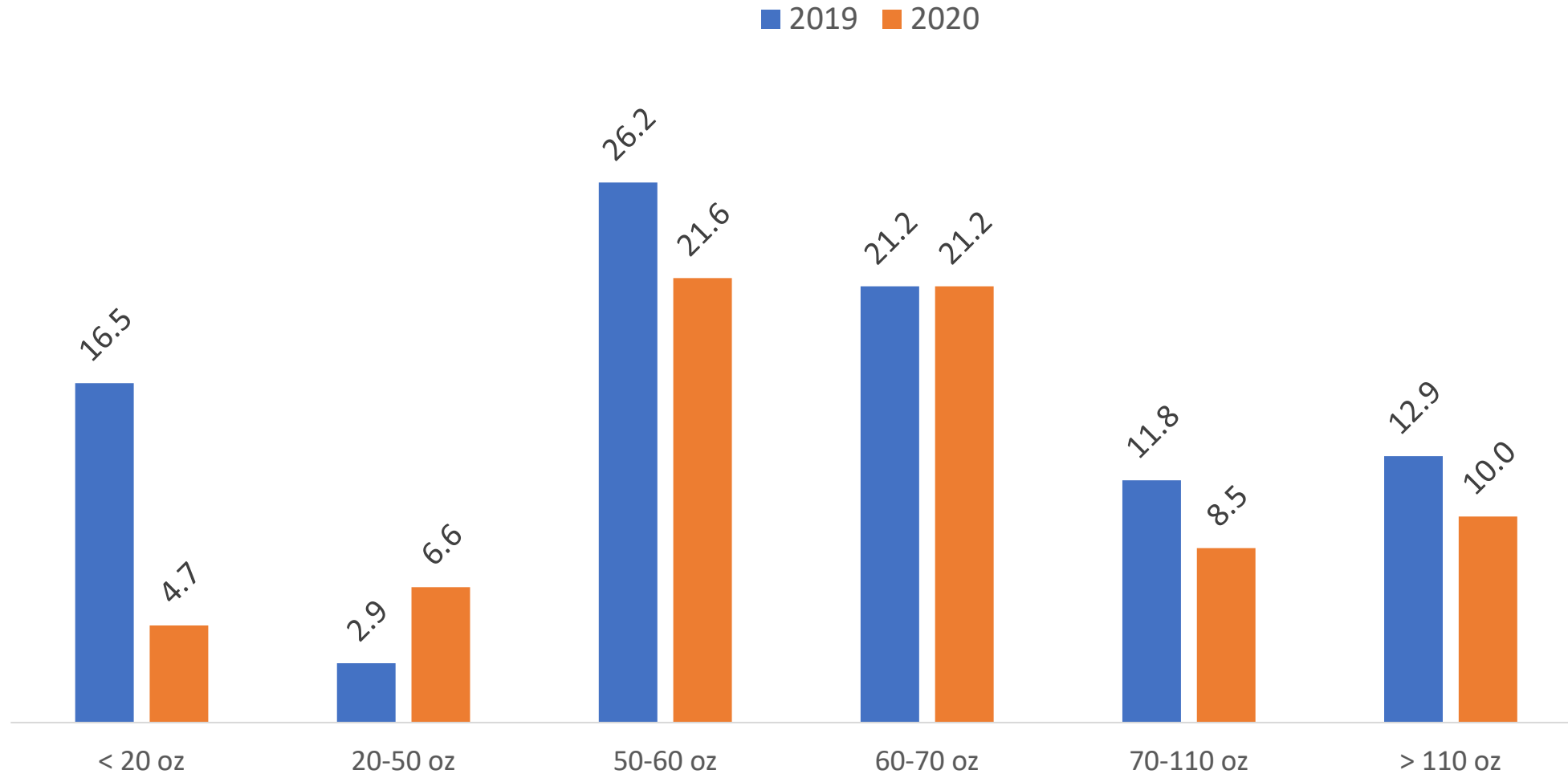
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice –REF NFC % Purchased on Any Perceived Deal by Container Size



Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice –REF RECON % Purchased on Any Perceived Deal by Container Size



Source: Nielsen Homescan™ data for Y/E Dec 2020



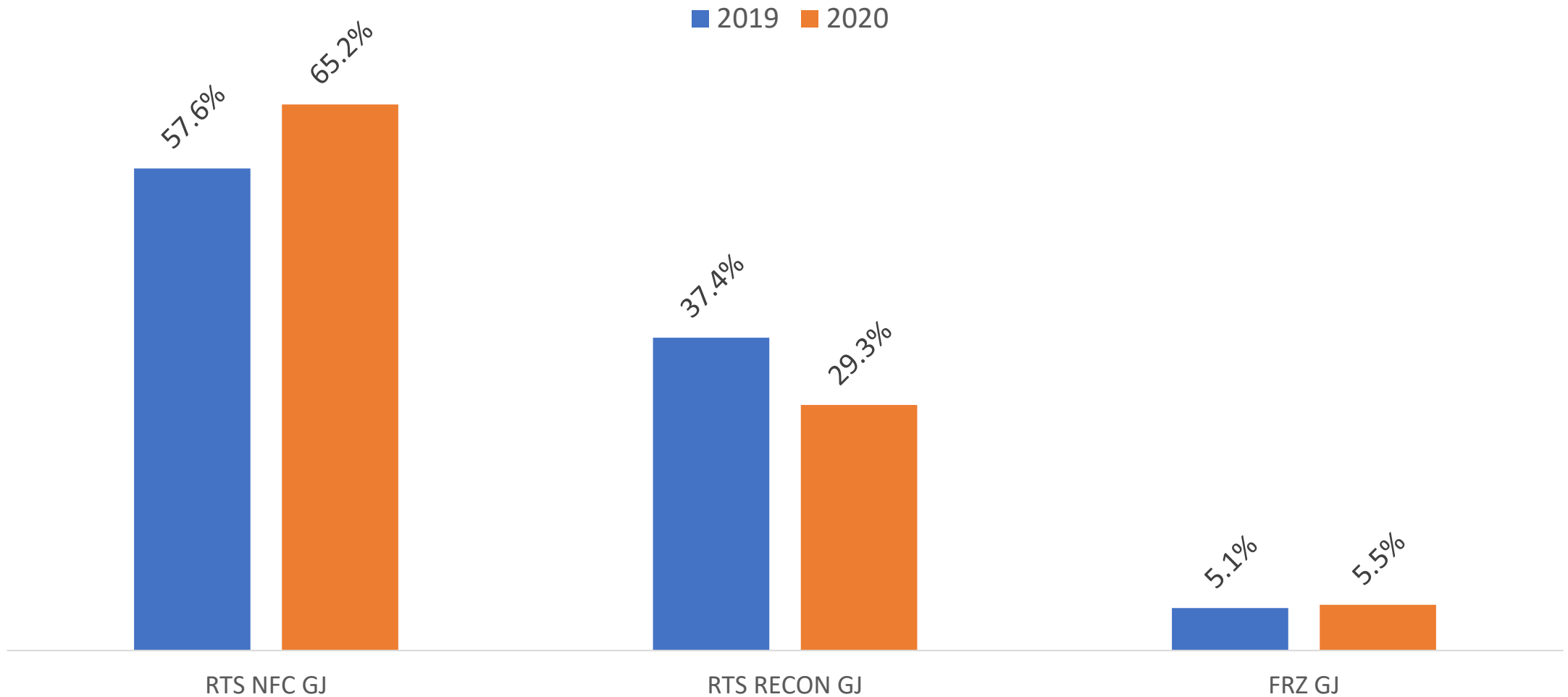
Grapefruit Juice Purchasing Review

GJ HH Purchasing Trends

Year	Household Penetration	Buying Rate	Purchase Frequency	% Purchased on Perceived Deal
2010	6.2	2	3	25
2011	5.5	2	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	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
2019	3.7	1.6	3.0	21
2020	4.0	1.6	3.1	20

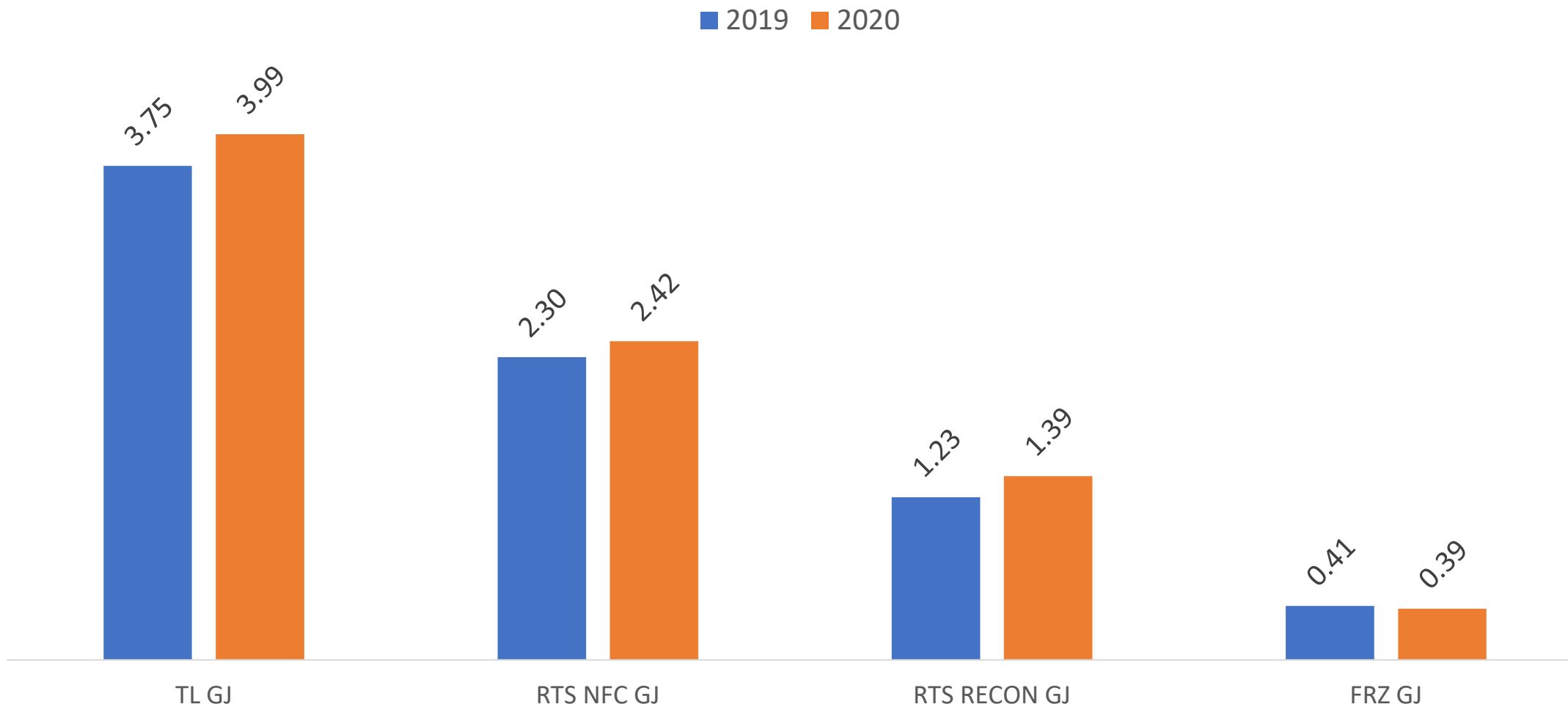
Source: Nielsen Homescan™ data for Y/E Dec 2020

Grapefruit Juice –% Share



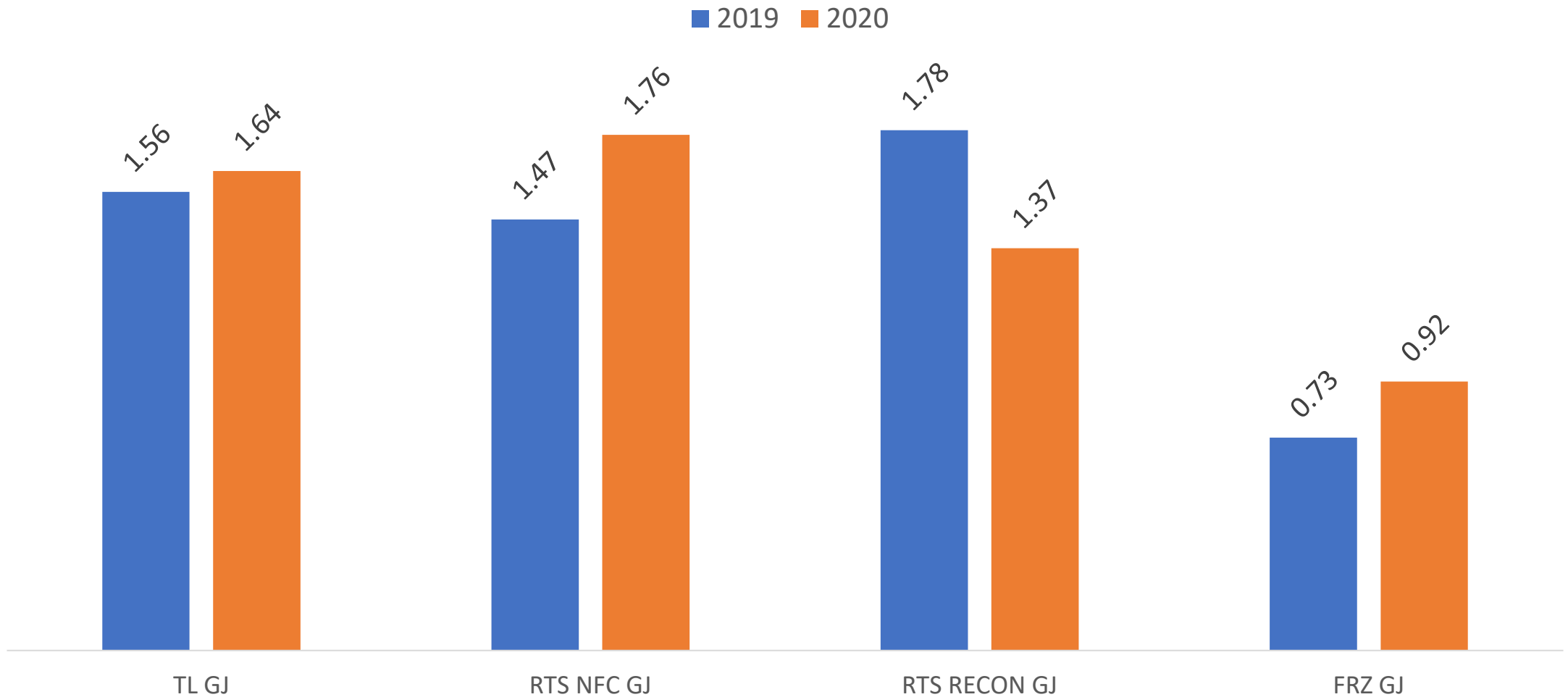
Source: Nielsen Homescan™ data for Y/E Dec 2020

Grapefruit Juice – Penetration



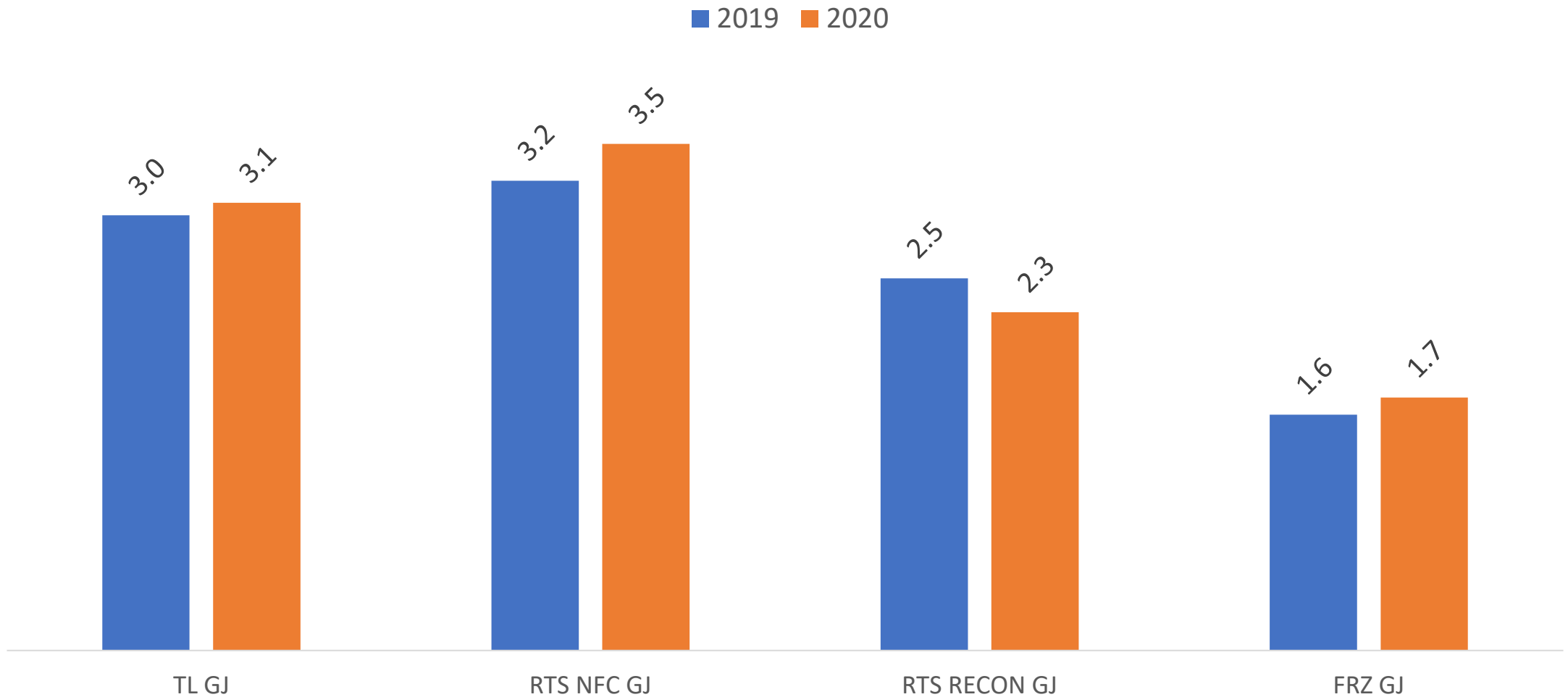
Source: Nielsen Homescan™ data for Y/E Dec 2020

Grapefruit Juice – Buying Rate



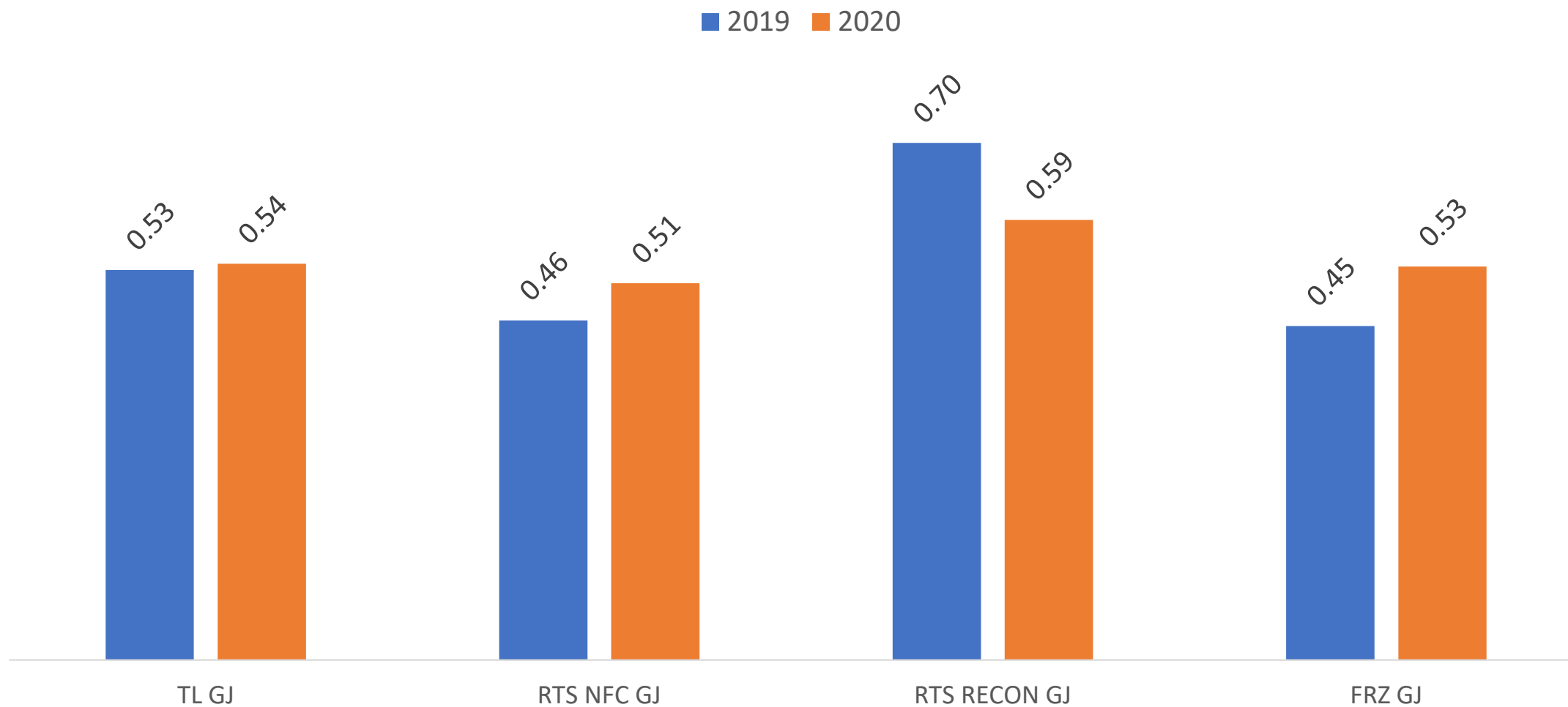
Source: Nielsen Homescan™ data for Y/E Dec 2020

Grapefruit Juice – Purchase Frequency



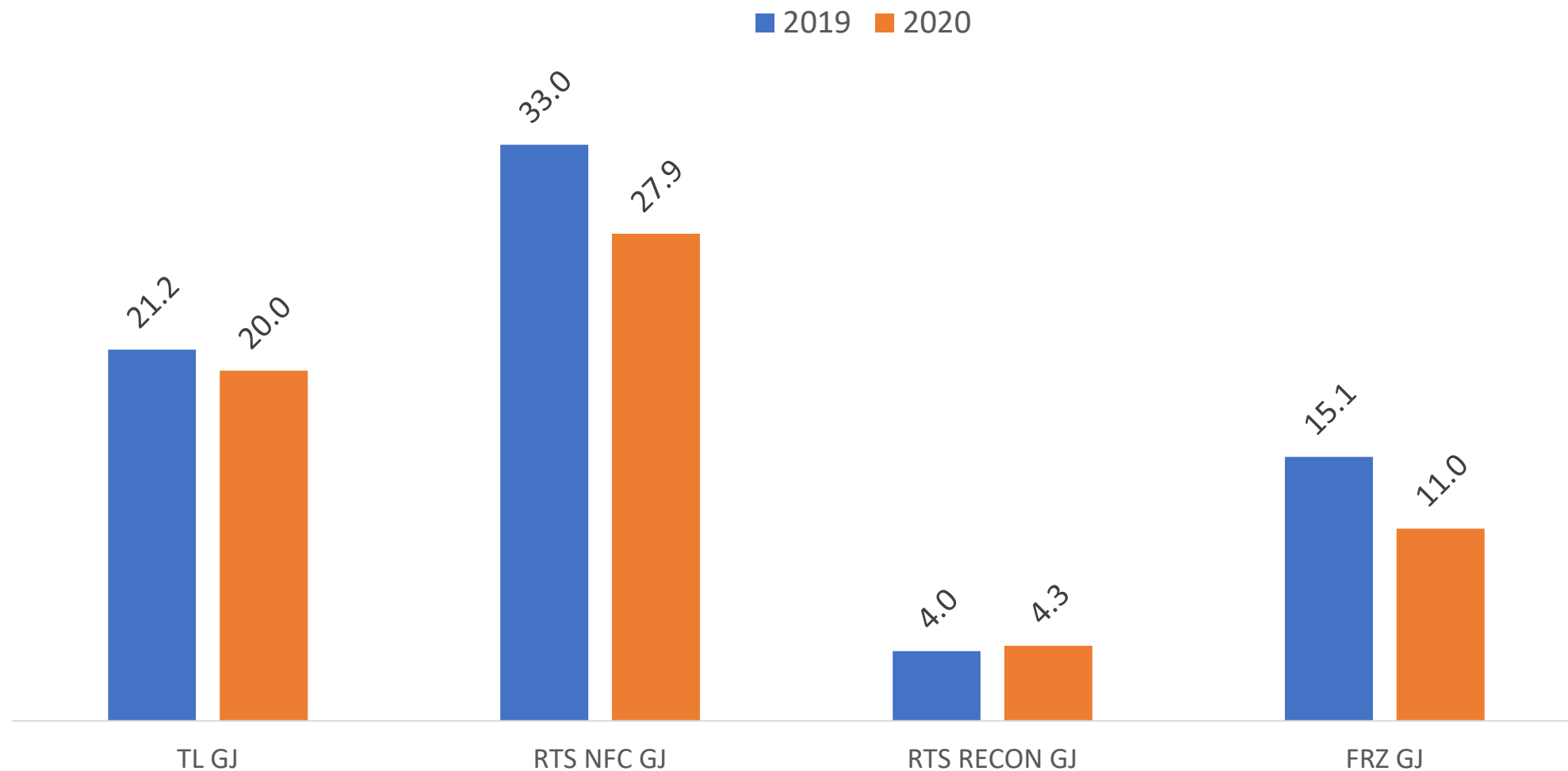
Source: Nielsen Homescan™ data for Y/E Dec 2020

Grapefruit Juice – Purchase Size



Source: Nielsen Homescan™ data for Y/E Dec 2020

Grapefruit Juice –% Purchased on Any Perceived Deal

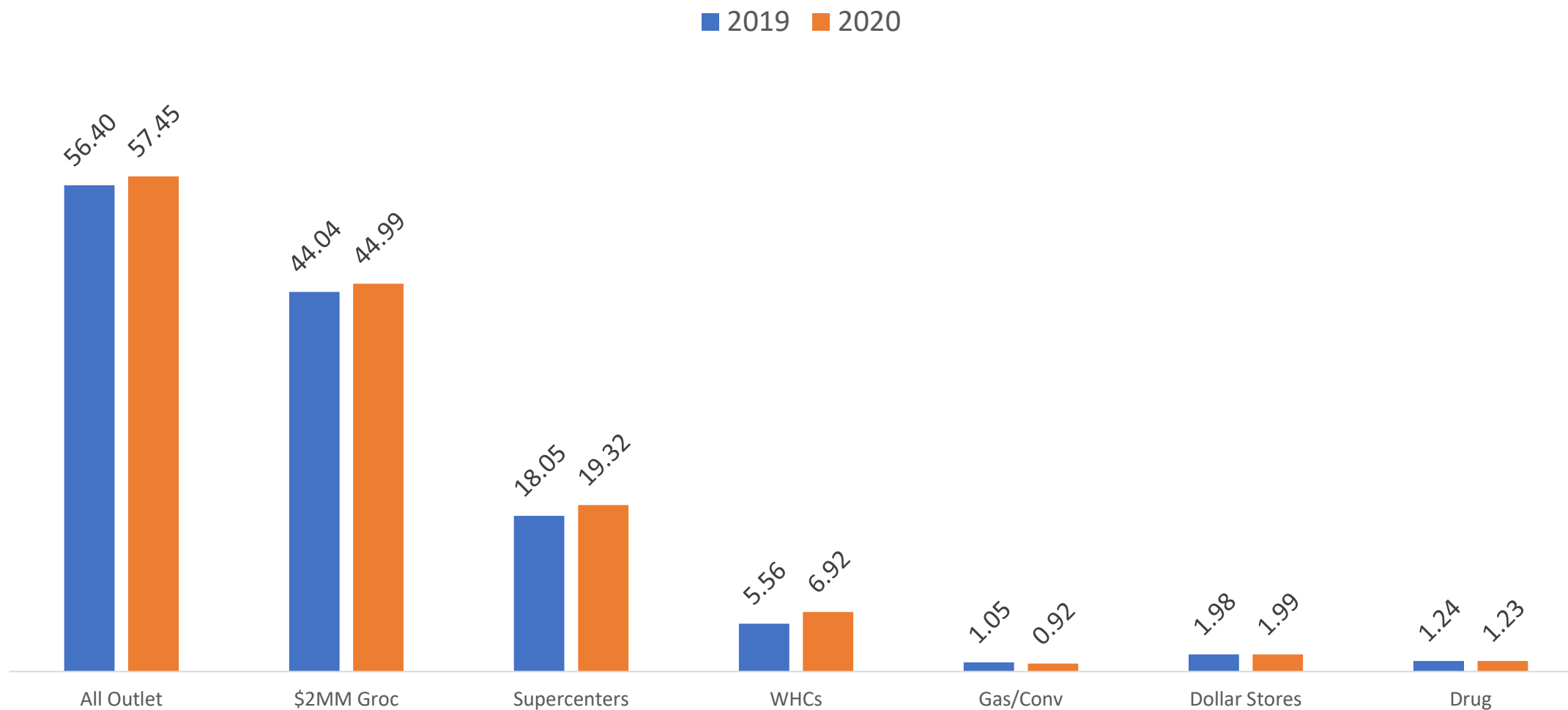


Source: Nielsen Homescan™ data for Y/E Dec 2020

The image features a minimalist design with two stylized, light gray hands. One hand is positioned in the upper left corner, holding a solid orange circle. The other hand is in the lower right corner, also holding a solid orange circle. The text 'Orange Juice Purchasing by Channel of Trade' is centered between these two hands in a bold, dark green font.

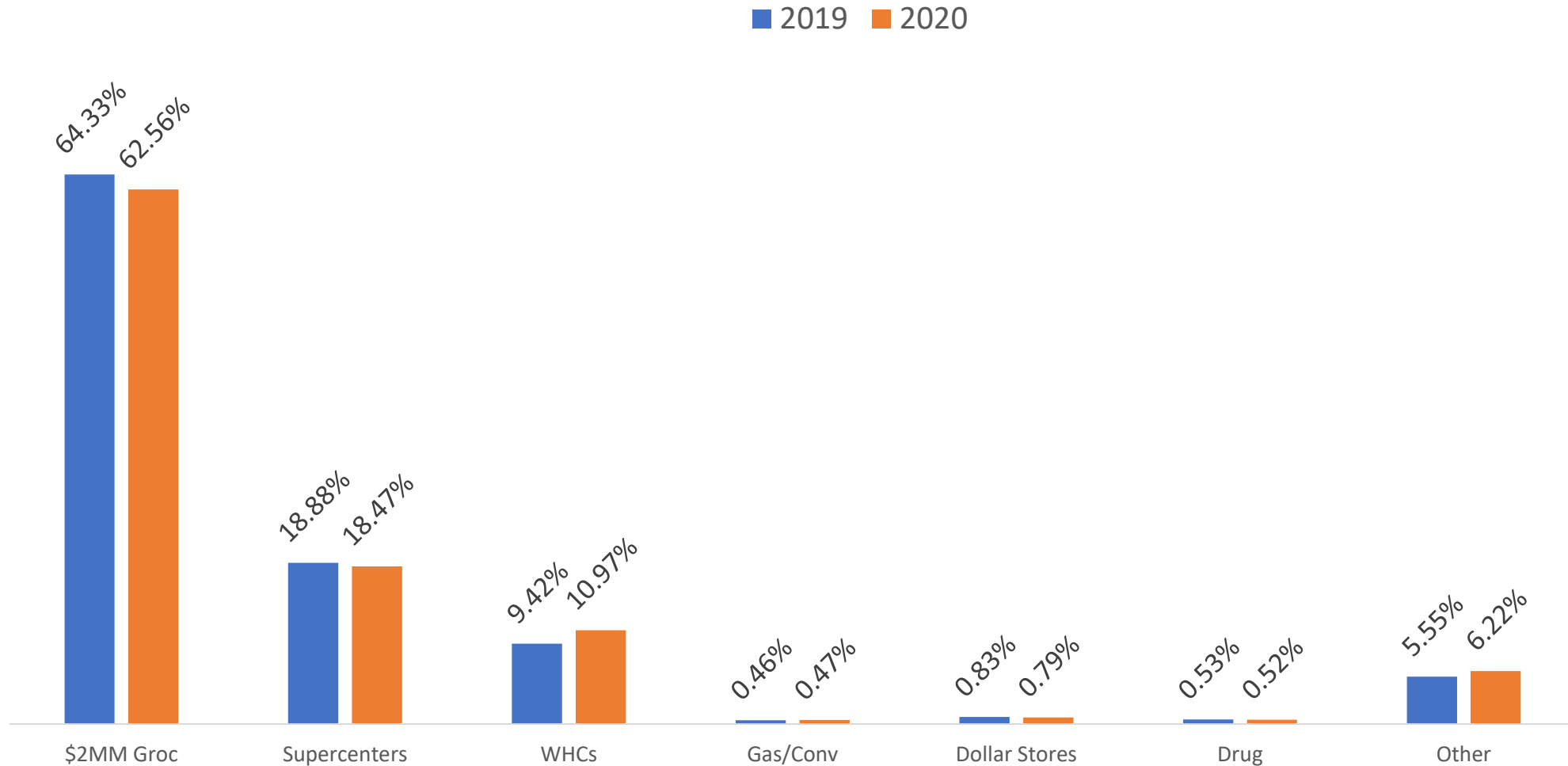
Orange Juice Purchasing by Channel of Trade

Orange Juice –Penetration by Channel



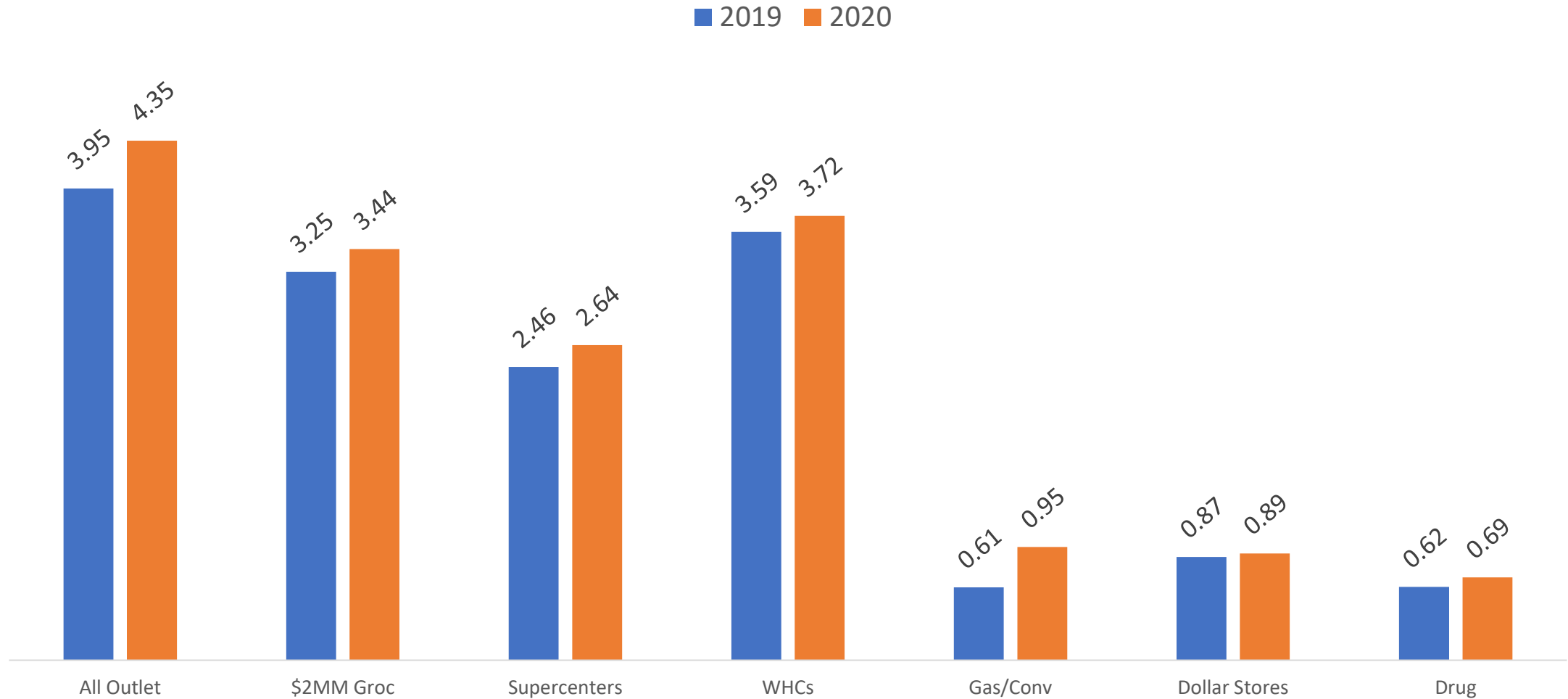
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice – Volume Share by Channel



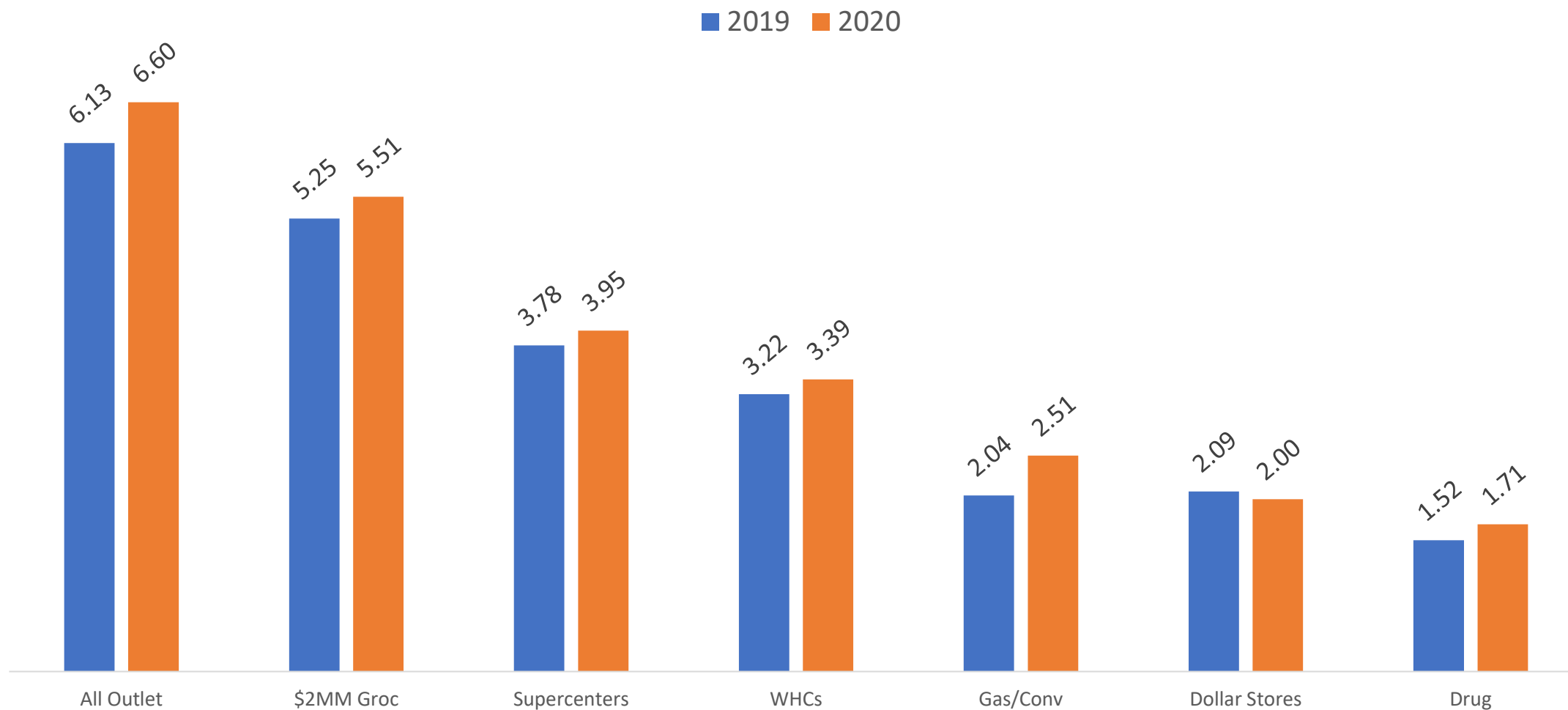
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice –Buying Rate by Channel



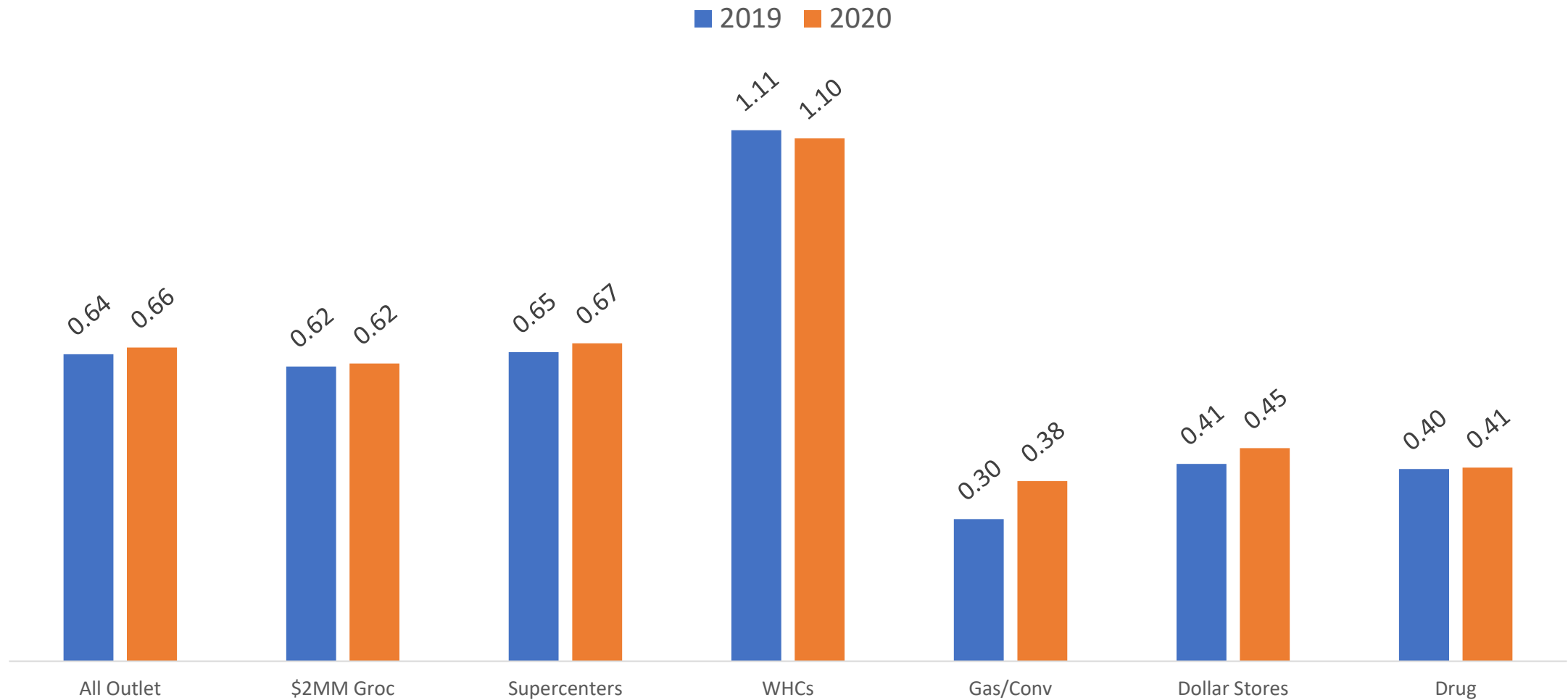
Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice –Purchase Frequency by Channel



Source: Nielsen Homescan™ data for Y/E Dec 2020

Orange Juice –Purchase Size by Channel



Source: Nielsen Homescan™ data for Y/E Dec 2020

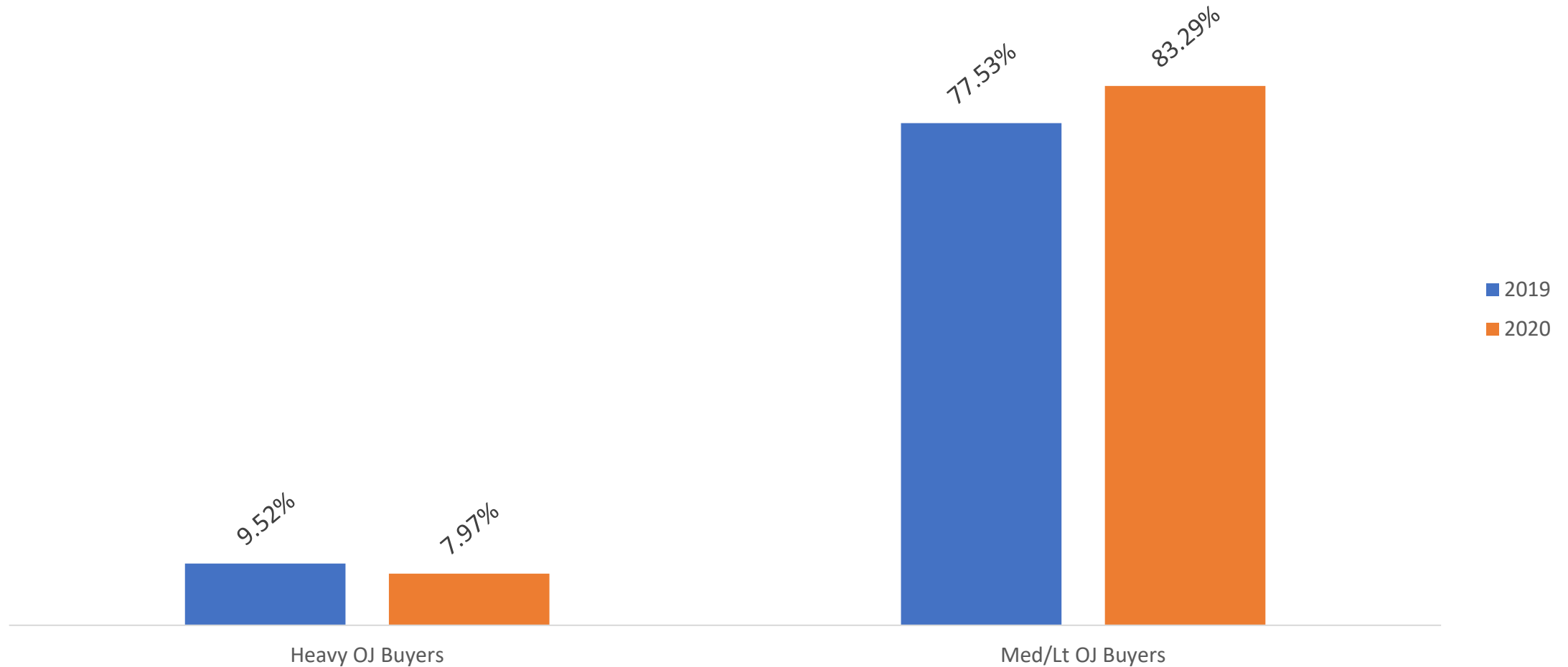
The image features a white background with two stylized, light gray hands. Each hand is holding a large, solid orange circle. The hand on the left is positioned in the upper left quadrant, and the hand on the right is in the lower right quadrant. The orange circles are centered within the palms of the hands.

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

Definitions of OJ Buyers

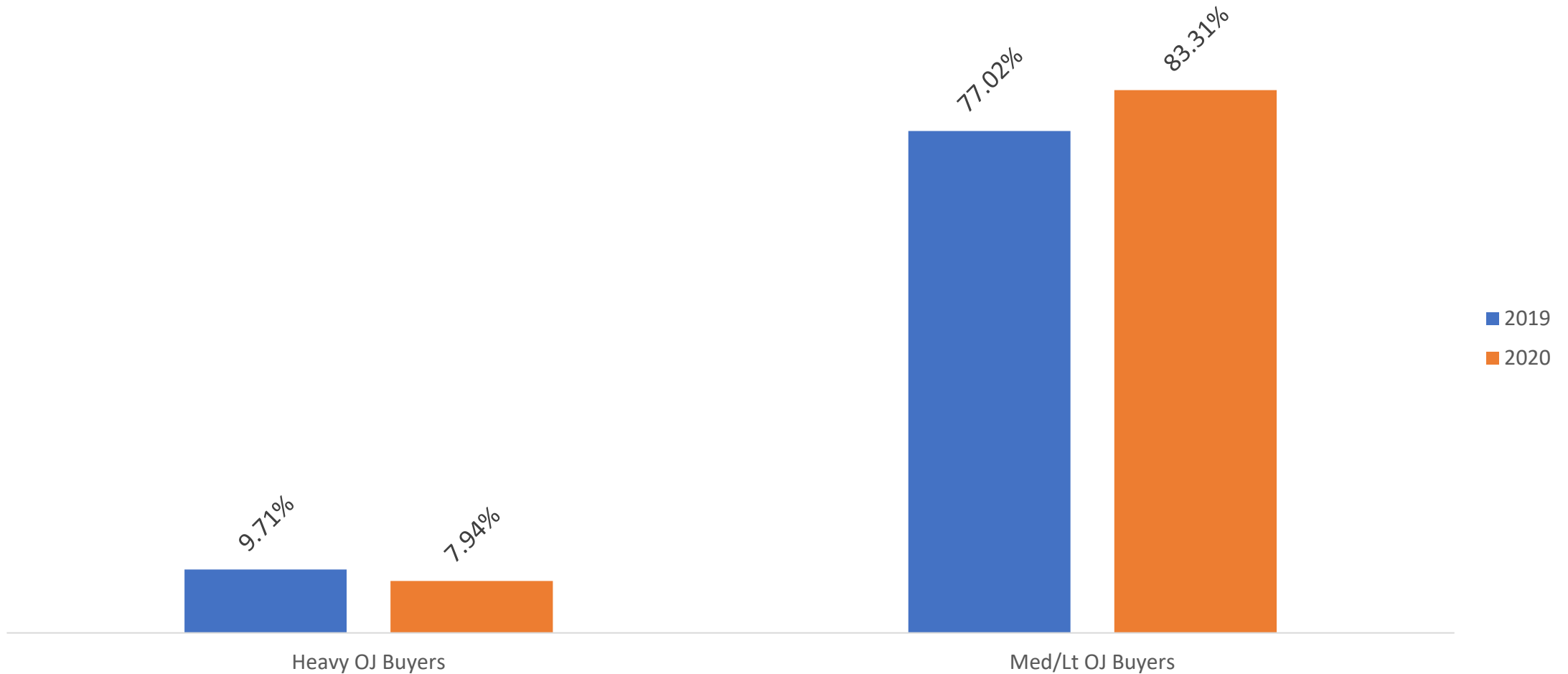
- For this analysis, three OJ Buyer groups are considered:
 - HEAVY OJ BUYER – *Household buys more than 12 gallons of OJ per year*
 - MED/LT OJ BUYER – *Household buys 12 gallons or less OJ per year (for further definition of Medium and Light, see Appendix)*
 - NON-BUYER – *Household did not report more than one OJ purchase in 2020 within the retail outlets covered by the Market Summary Report*

OJ Buying HHs (All OJ) Share of Households



Source: Nielsen Homescan™ data for Y/E Dec 2020

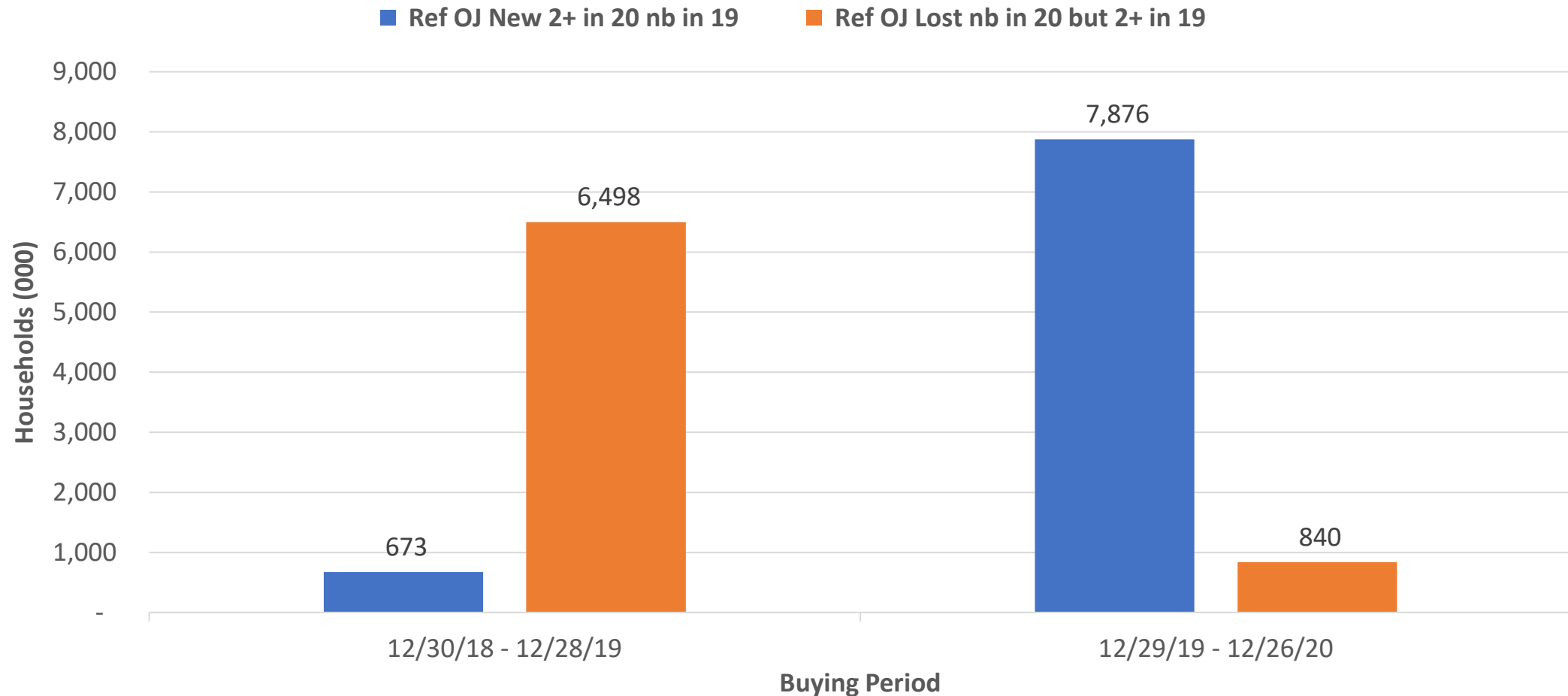
OJ Buying HHs (REF OJ) Share of Households



Source: Nielsen Homescan™ data for Y/E Dec 2020

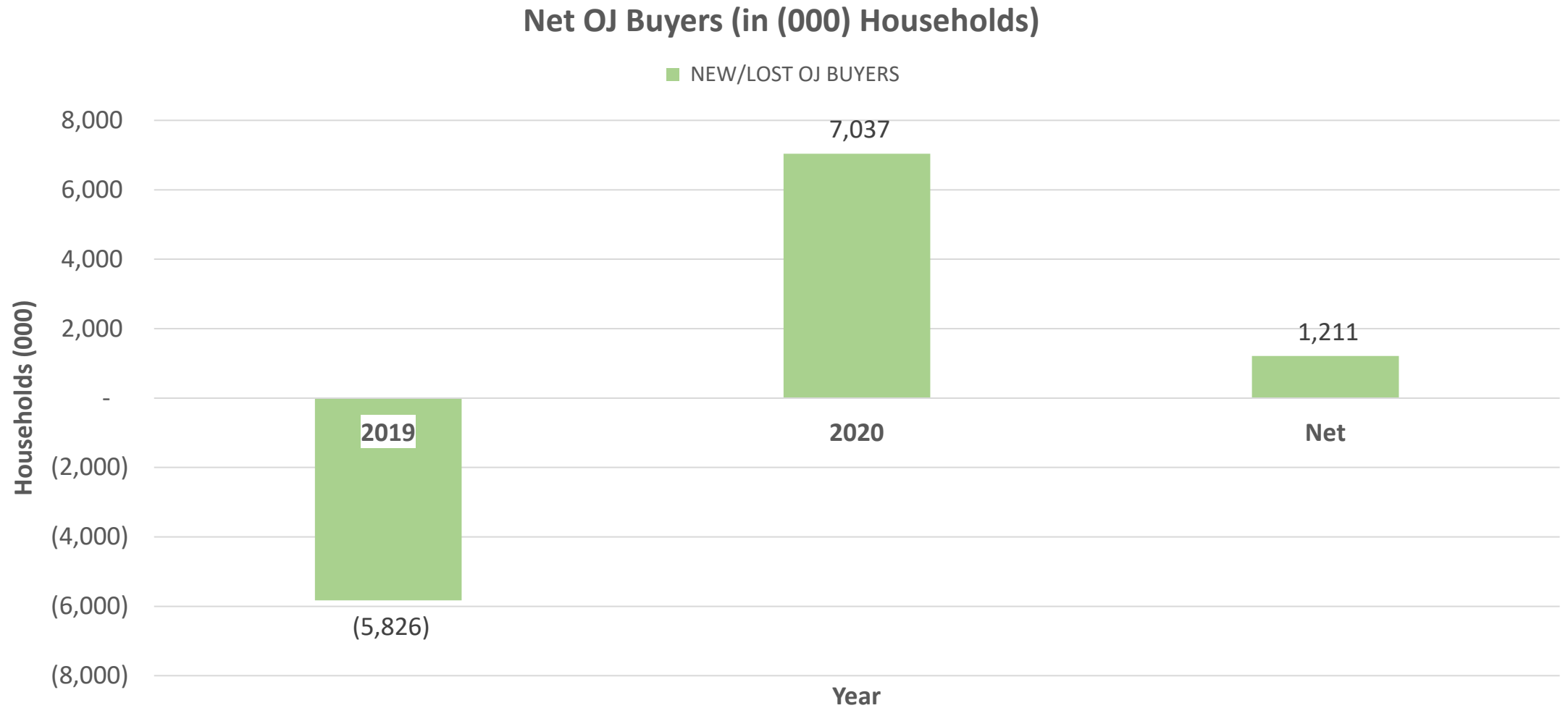
Non-OJ Buying HHs (All OJ)

New and Lost OJ Buyers (in (000) Households)



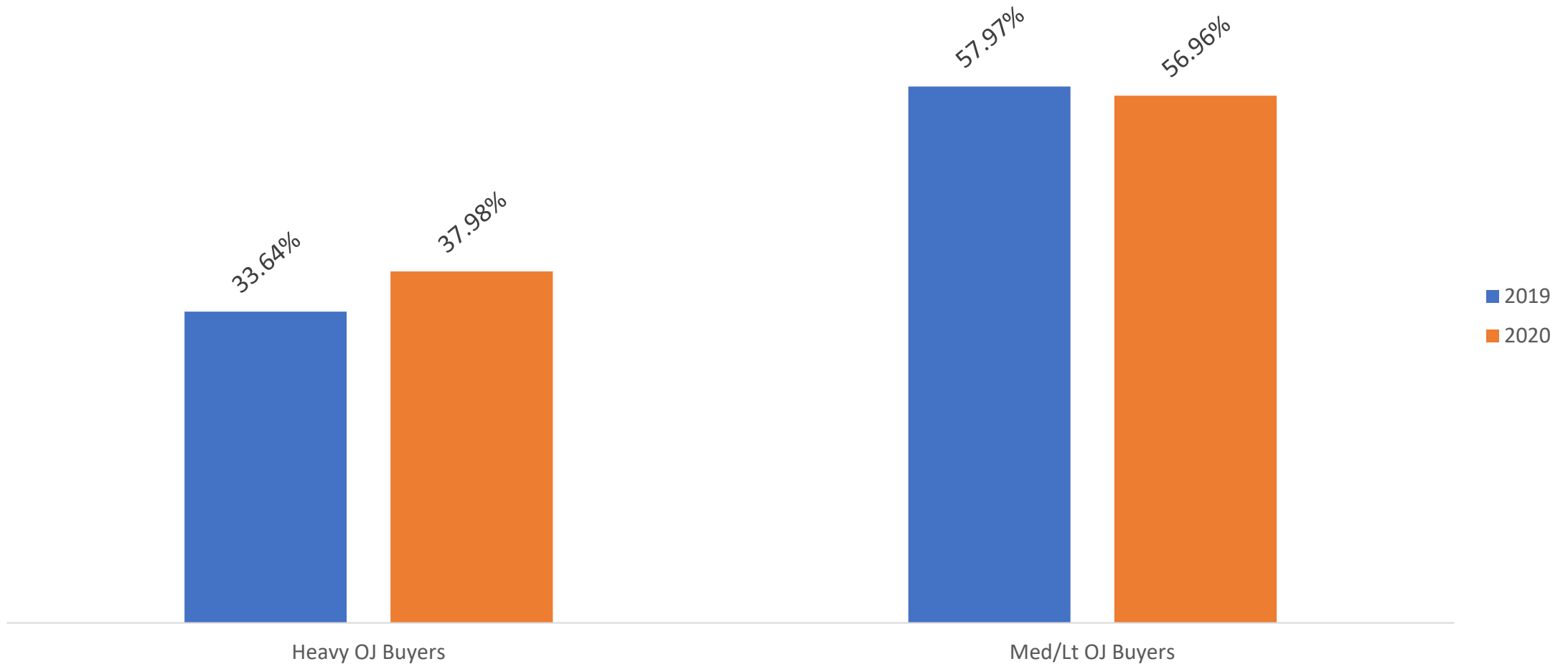
Source: Nielsen Homescan™ data for Y/E Dec 2020

Non-OJ Buying HHs (All OJ)



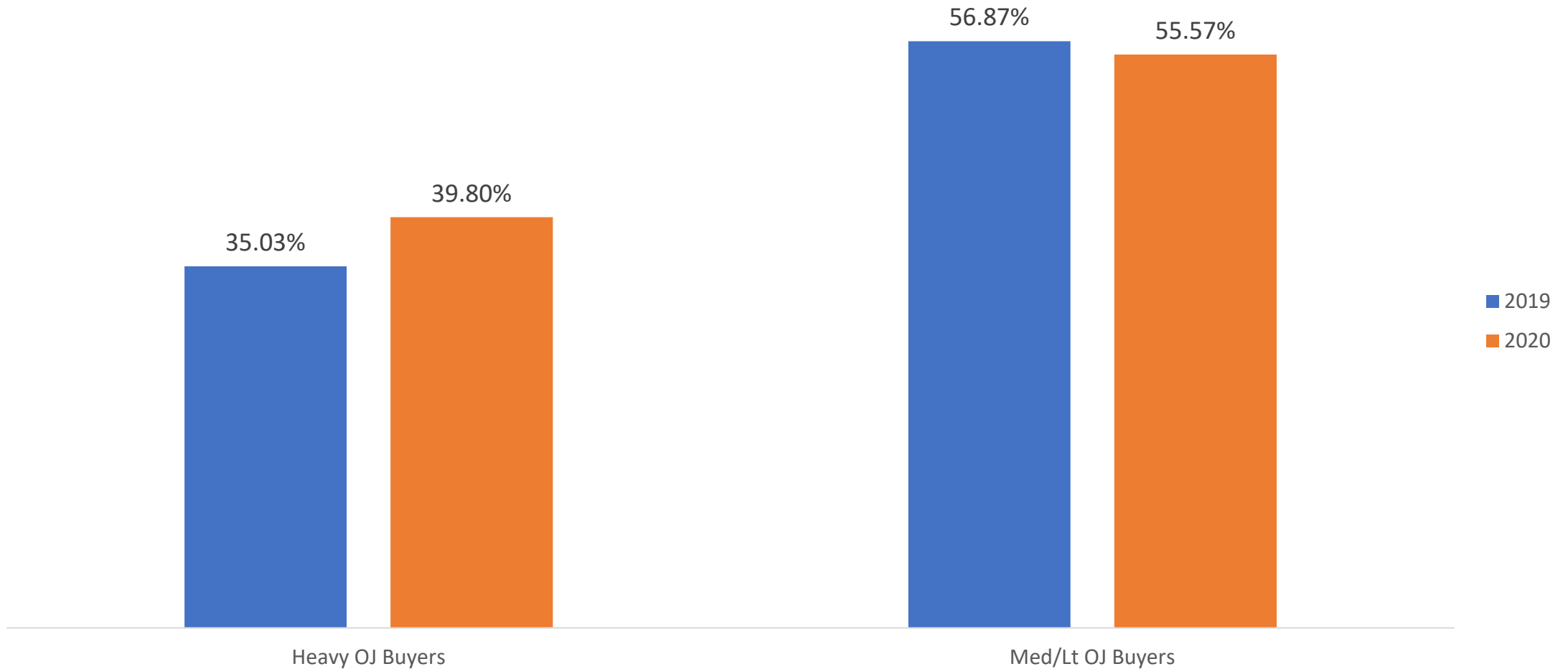
Source: Nielsen Homescan™ data for Y/E Dec 2020

OJ Buying HHs (All OJ) Share of Gallons Purchased



Source: Nielsen Homescan™ data for Y/E Dec 2020

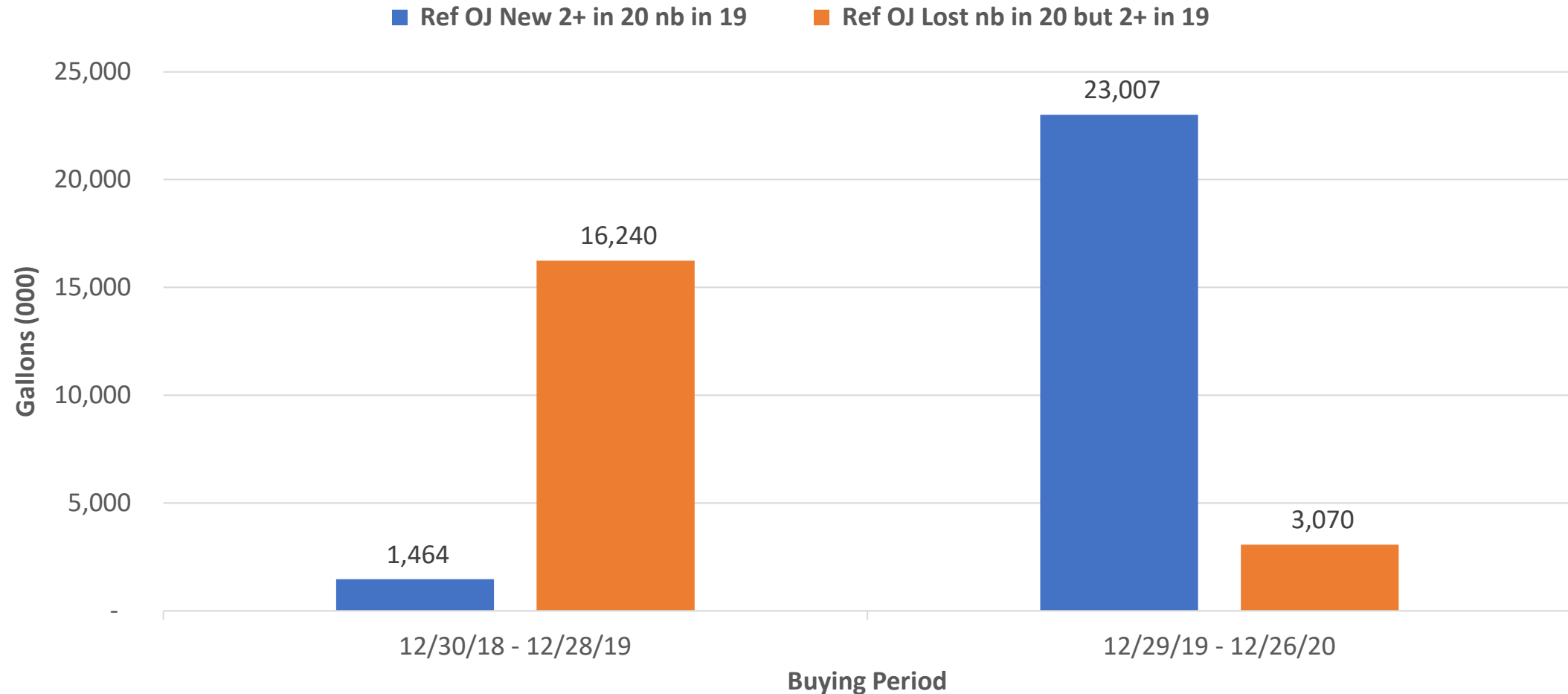
OJ Buying HHs (REF OJ) Share of Gallons Purchased



Source: Nielsen Homescan™ data for Y/E Dec 2020

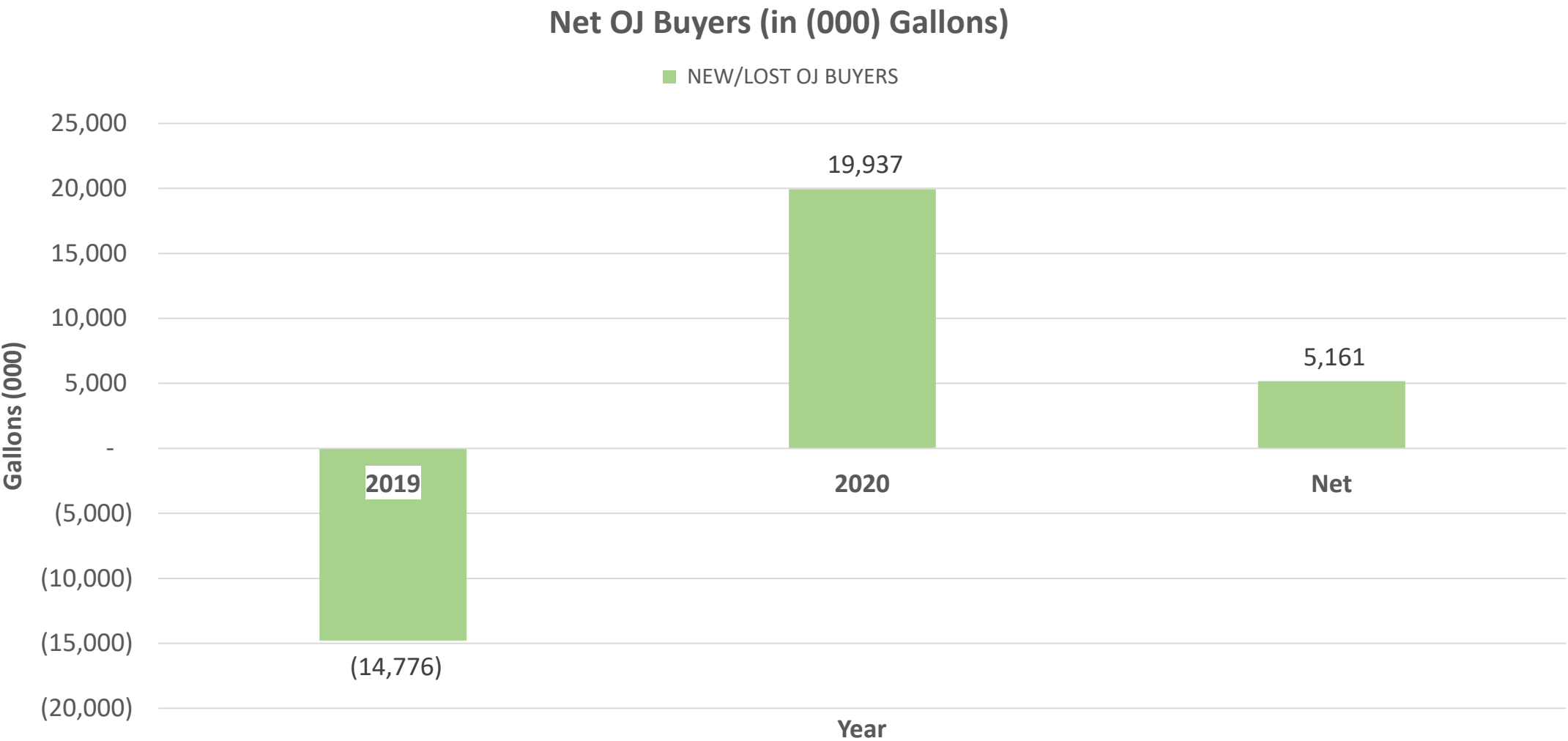
Non-OJ Buying HHs (All OJ)

New and Lost OJ Buyers (in (000) Gallons)



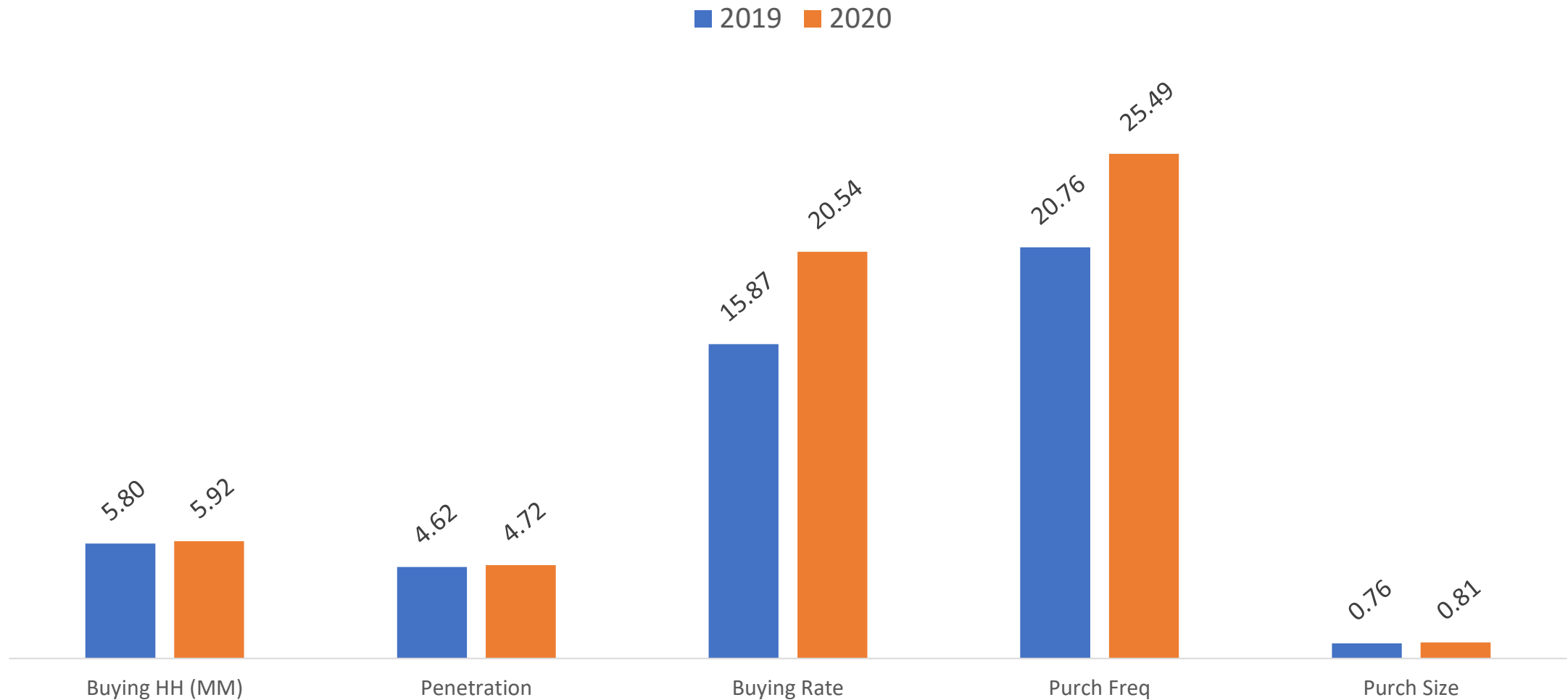
Source: Nielsen Homescan™ data for Y/E Dec 2020

Non-OJ Buying HHs (All OJ)



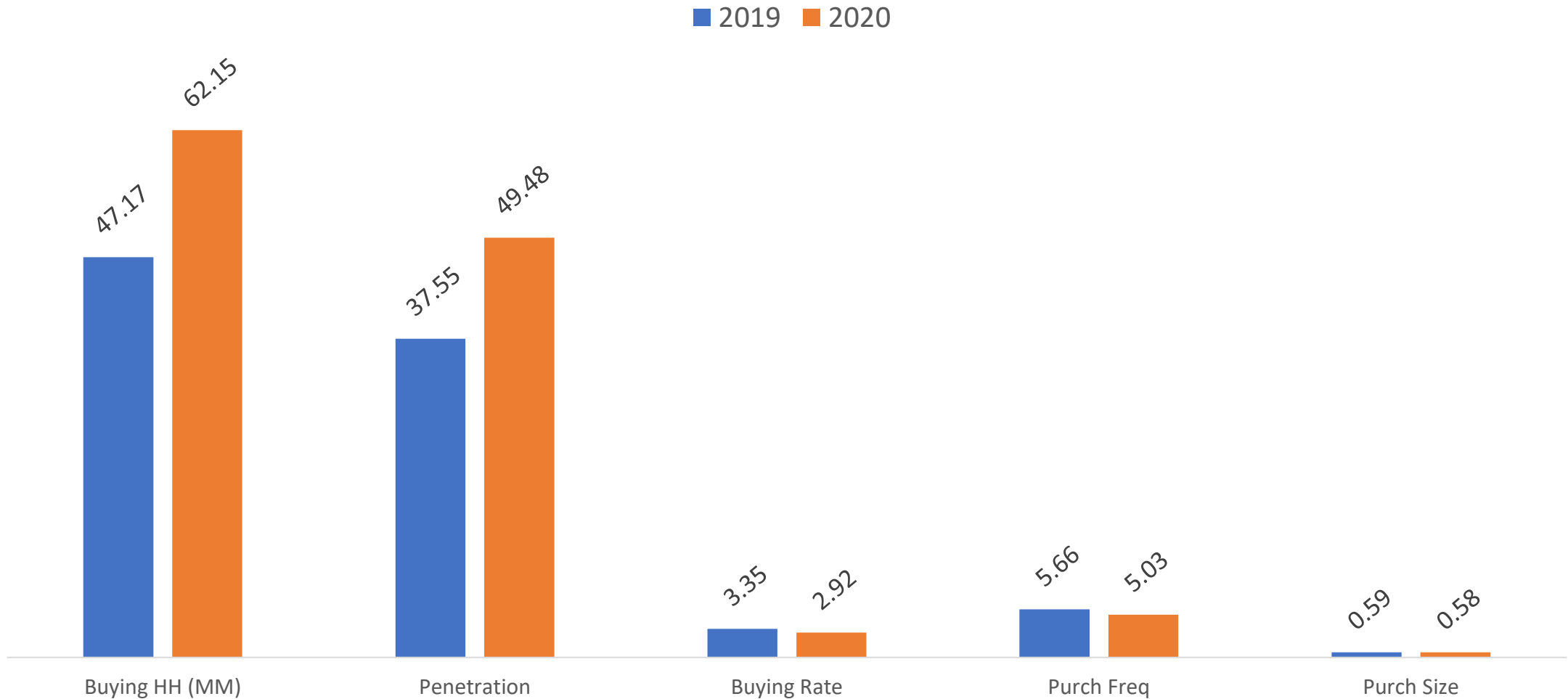
Source: Nielsen Homescan™ data for Y/E Dec 2020

Heavy OJ Buyers –OJ Purchasing Trends



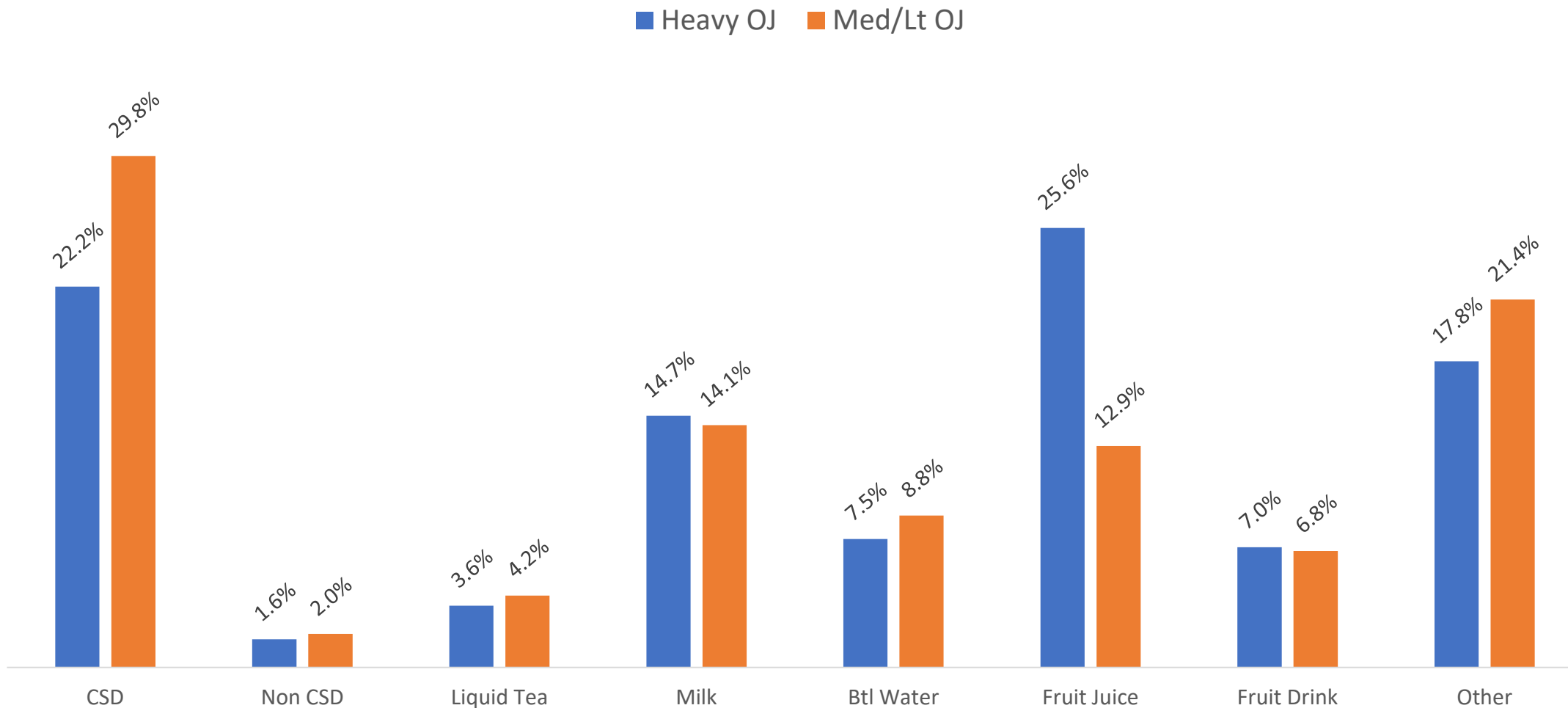
Source: Nielsen Homescan™ data for Y/E Dec 2020

Med/Lt OJ Buyers –OJ Purchasing Trends



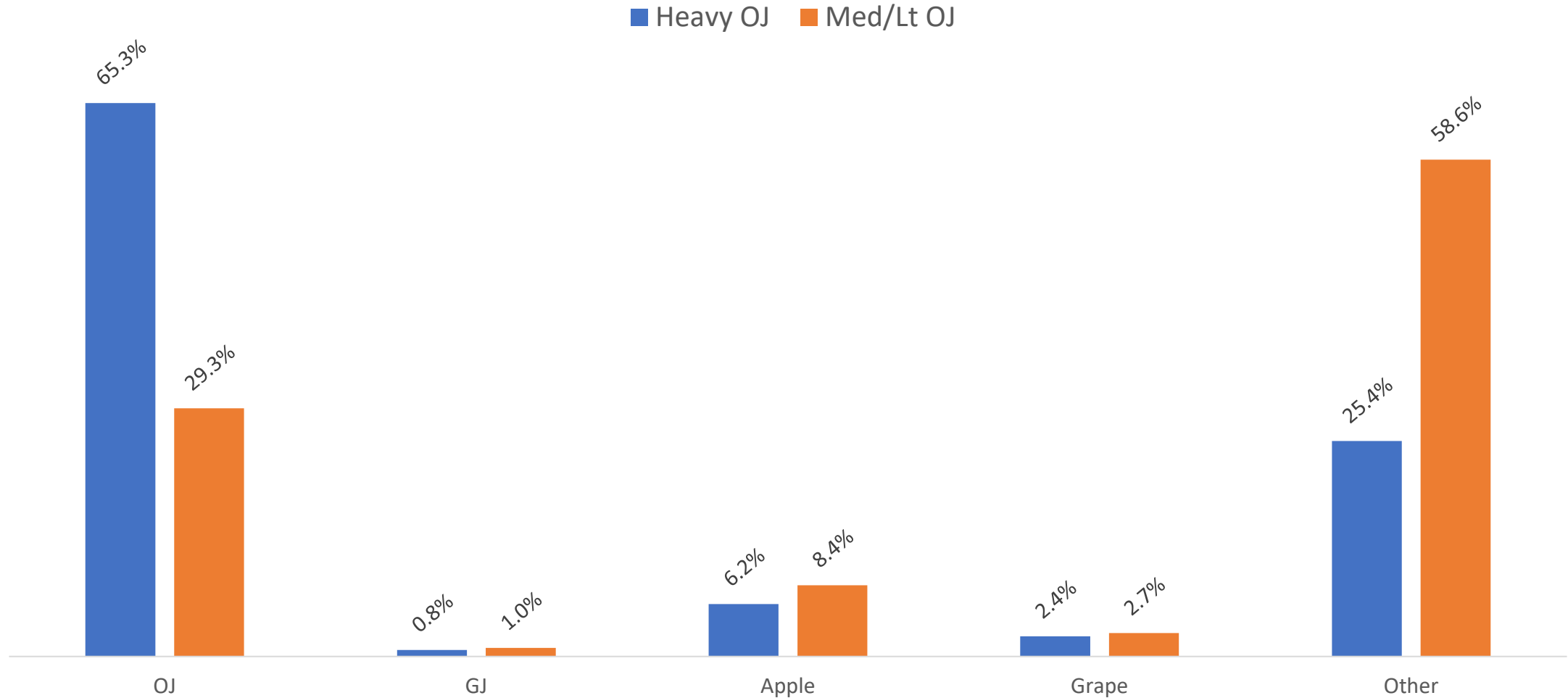
Source: Nielsen Homescan™ data for Y/E Dec 2020

Where did OJ Buying HHs spend beverage dollars in 2020? (Dollar share percentage)



Source: Nielsen Homescan™ data for Y/E Dec 2020

Where did OJ Buying HHs spend juice dollars in 2020? (Dollar share percentage)



Source: Nielsen Homescan™ data for Y/E Dec 2020

Thank You

